



Montgomery Planning Countywide Planning and Policy Division / Research and Strategic Projects Division

02/22/2024

Agenda item 9

2024 Growth and Infrastructure Policy Update: Growth Status and Trends

Briefing Agenda

- Growth and Infrastructure Policy – brief overview
- County Growth Trends – historic/current
- County Growth Forecasts
- Q&A

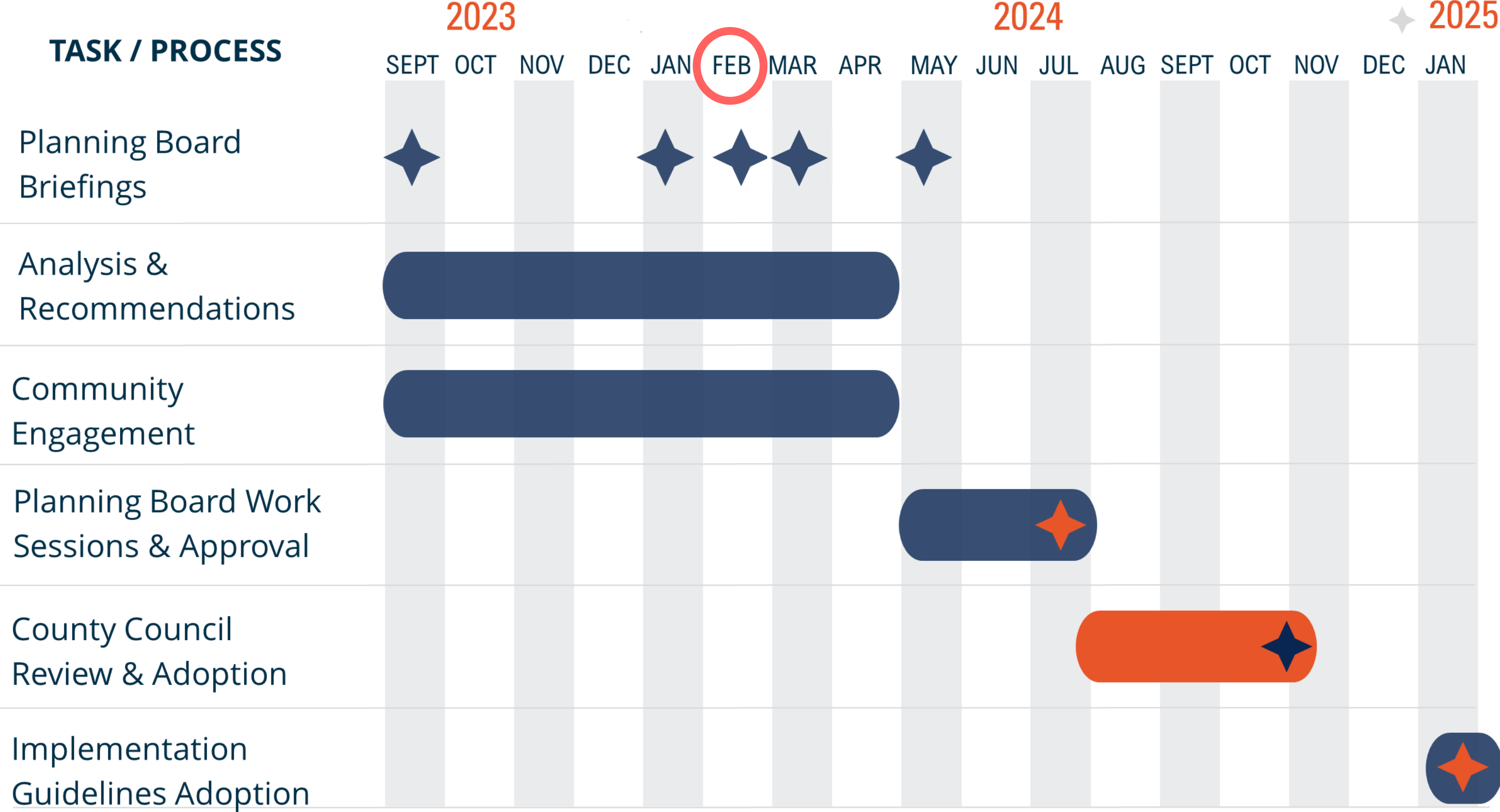
Growth and Infrastructure Policy

What is the Growth and Infrastructure Policy?

- The **Growth and Infrastructure Policy (GIP)** directs the Planning Board's administration of adequate public facility requirements
- The County's **Adequate Public Facilities (APF)** requirement states:
 - *“The [Planning] Board may only approve a preliminary plan when it finds that public facilities will be **adequate** to support and service the subdivision.”*



Project Schedule



2024 Update: Consider Current Growth Trends

Consider the Current Growth Trends

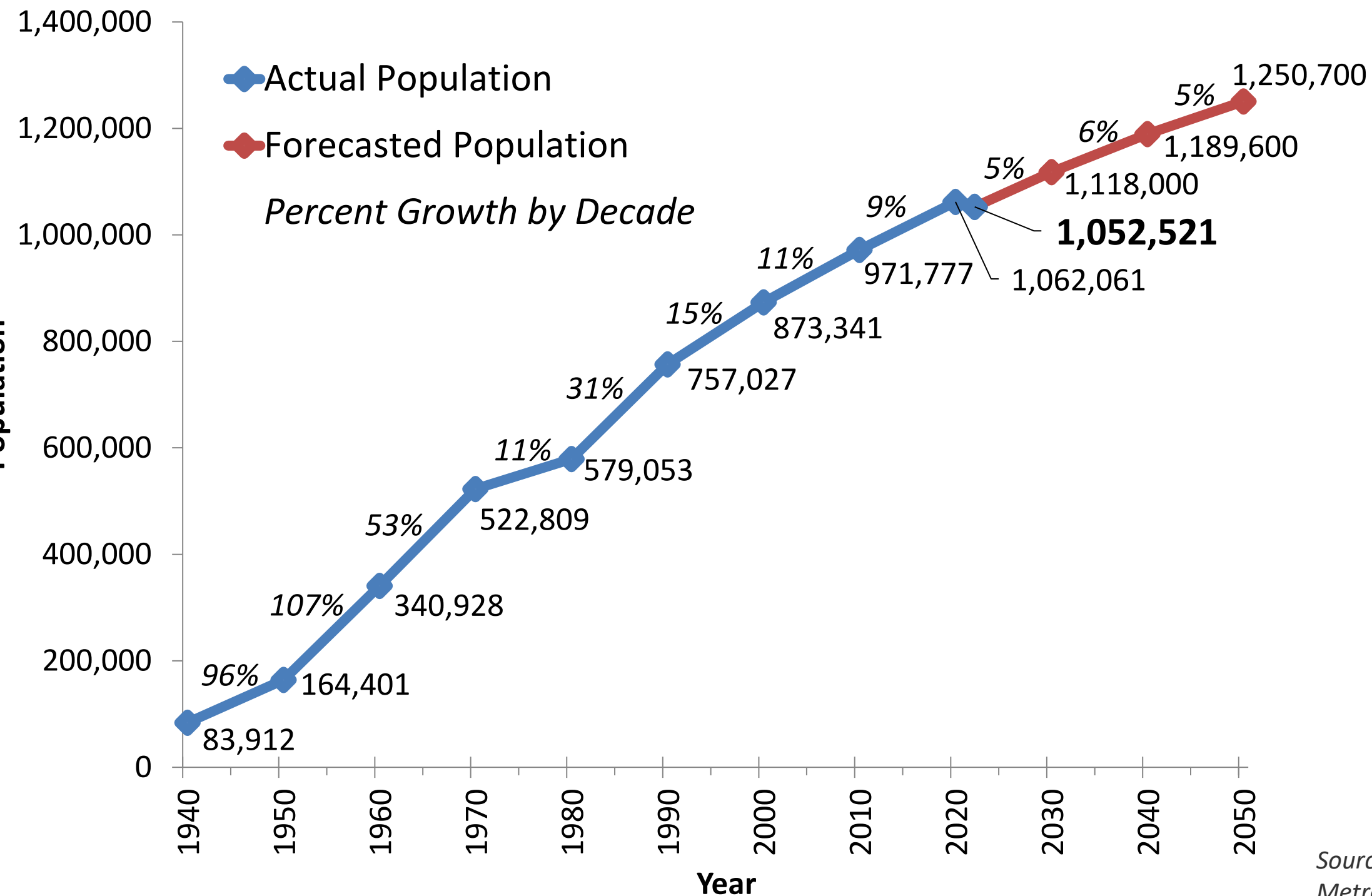
- Analysis of relevant growth measures and forecast of probable growth trends
- Examine changes from the 2020 analysis
- Inform recommendations for GIP revisions



County Growth Trends

Slower growth in a maturing county

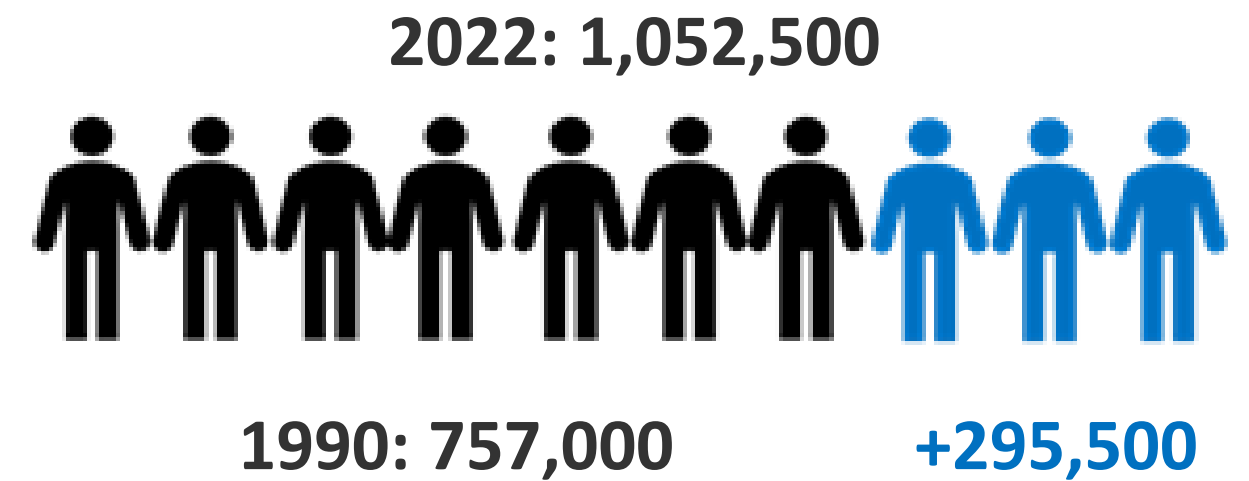
Total Population, 1940-2050



Most populous county in Maryland with over 1 million people since 2012



39% population increase since 1990



Forecasting a 19% gain of 198,200 people between 2022 and 2050

Sources: 1940-2020 Decennial Censuses and 2022 Population Estimates, U.S. Census Bureau; Metropolitan Washington Council of Governments, Cooperative Forecast Round 10.0.

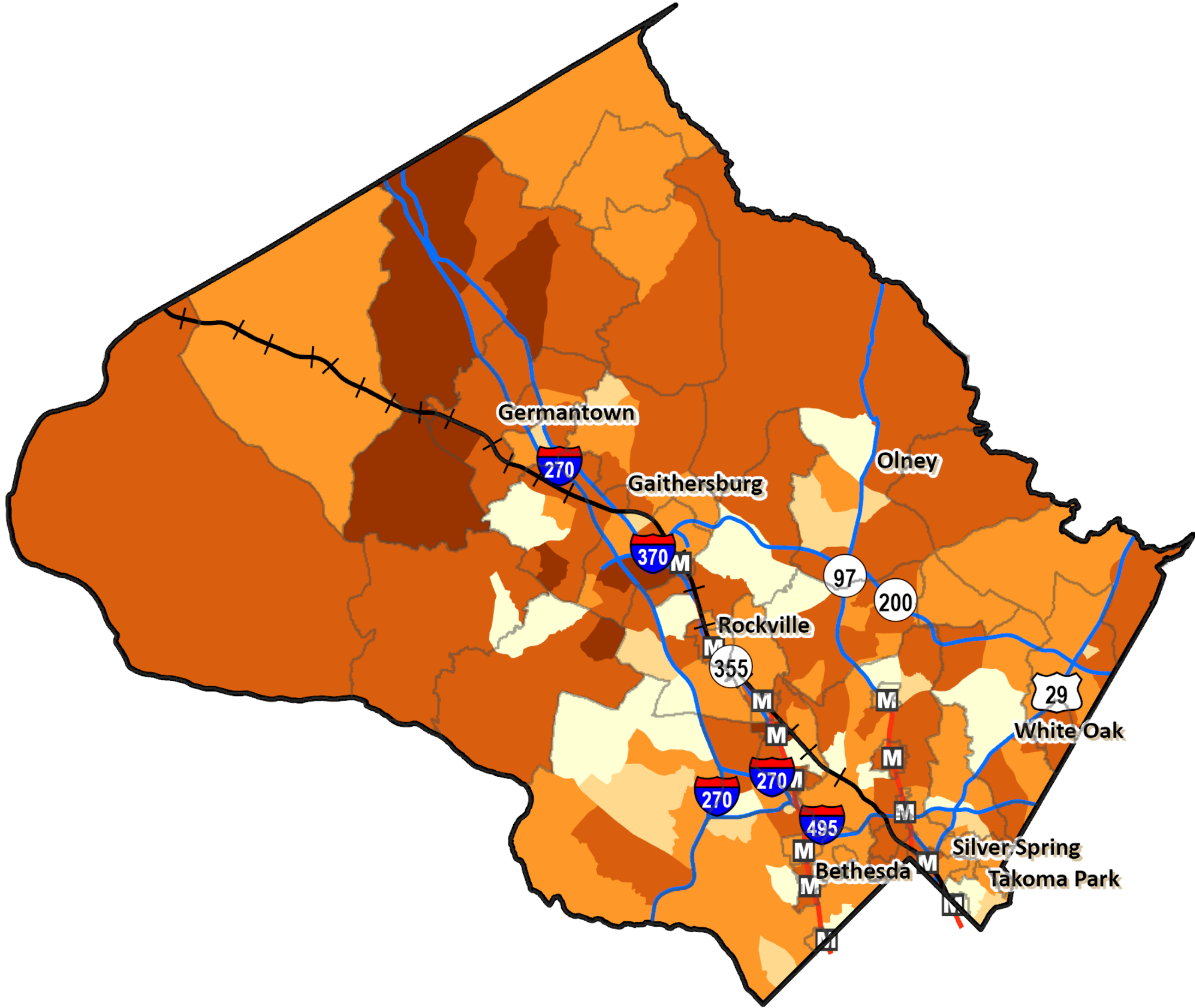
Population Change 1990-2021 by Census Tract

Population Change - 1990-2021

- Decrease
- No significant change
- 225 - 999
- 1,000 - 3,999
- 4,000 or more

Roads and Transitways

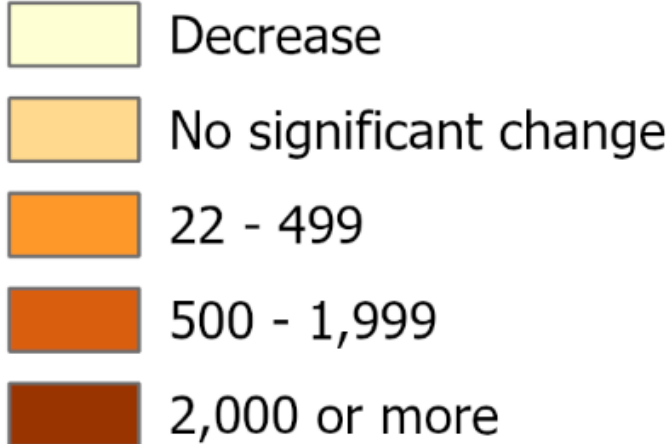
- Major Highways and Roads
- MARC Line
- Metro Line
- M Metro Stations



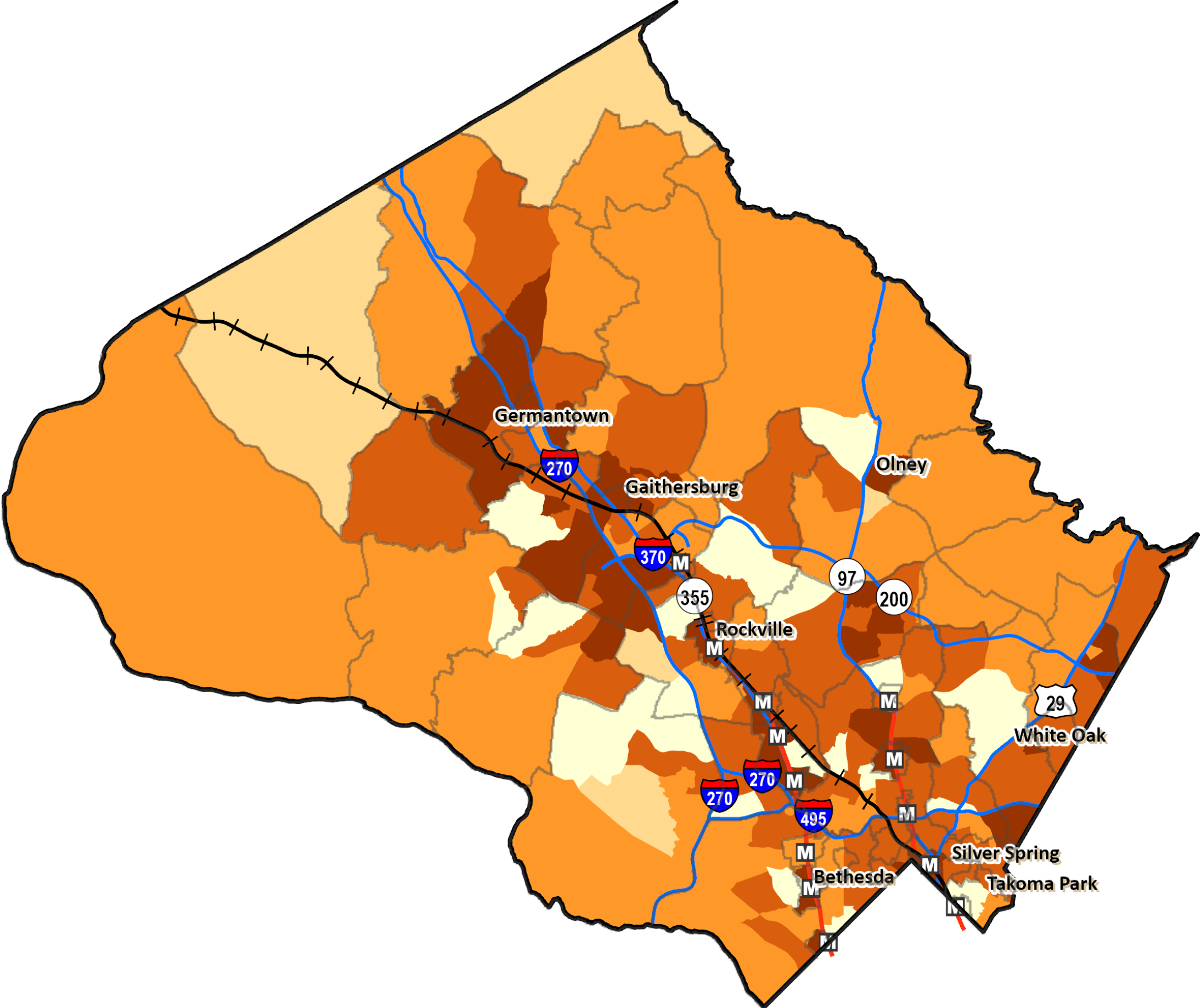
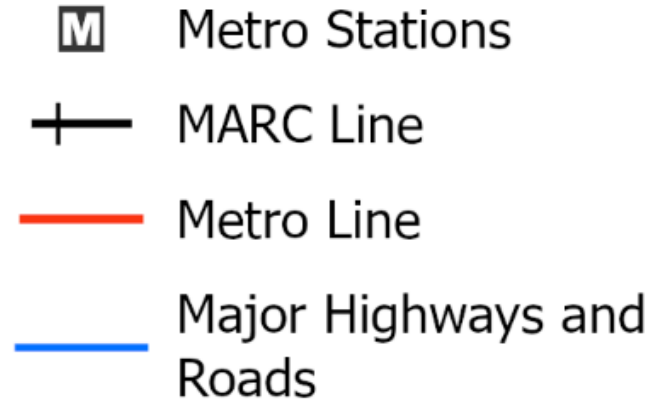
Source: 1990 Decennial Census and 2021 American Community Survey, 5-year estimates, U.S. Census Bureau.

Population Density Change 1990-2021 by Census Tract

Population Density Change



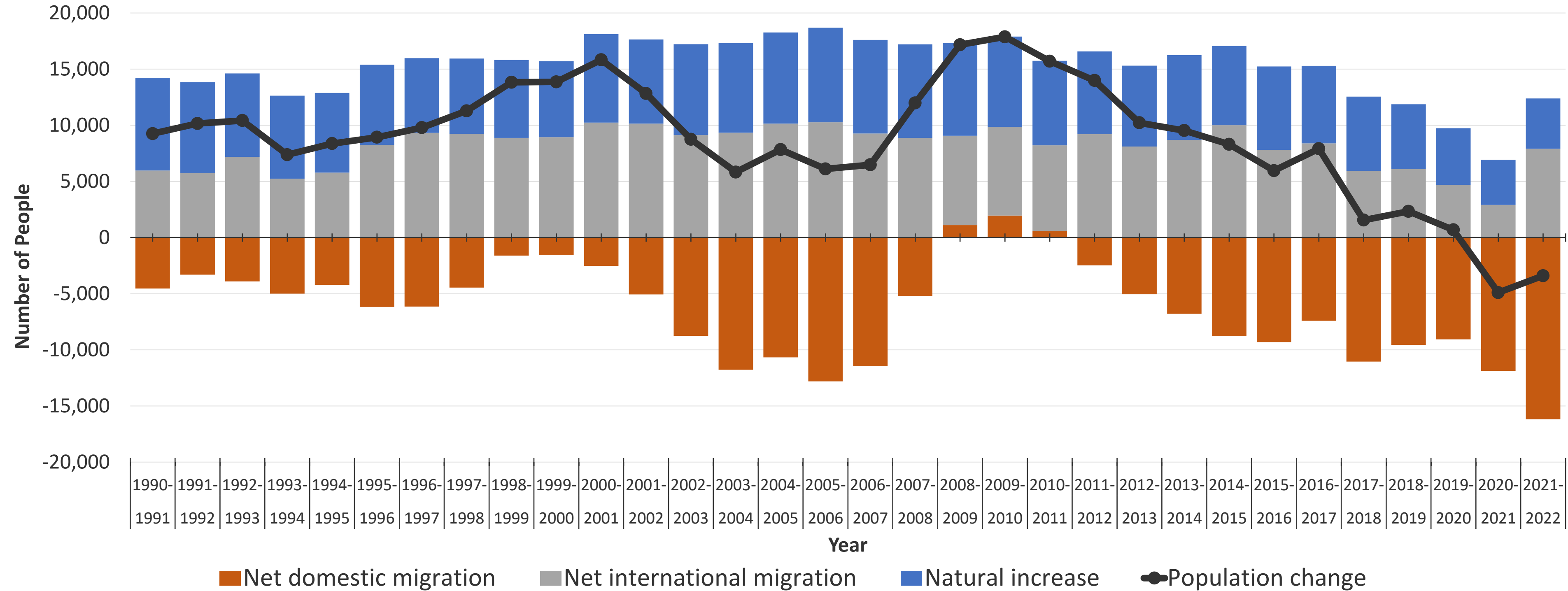
Roads and Transitways



Source: 1990 Decennial Census and 2021 American Community Survey, 5-year estimates, U.S. Census Bureau.

Sources of population growth

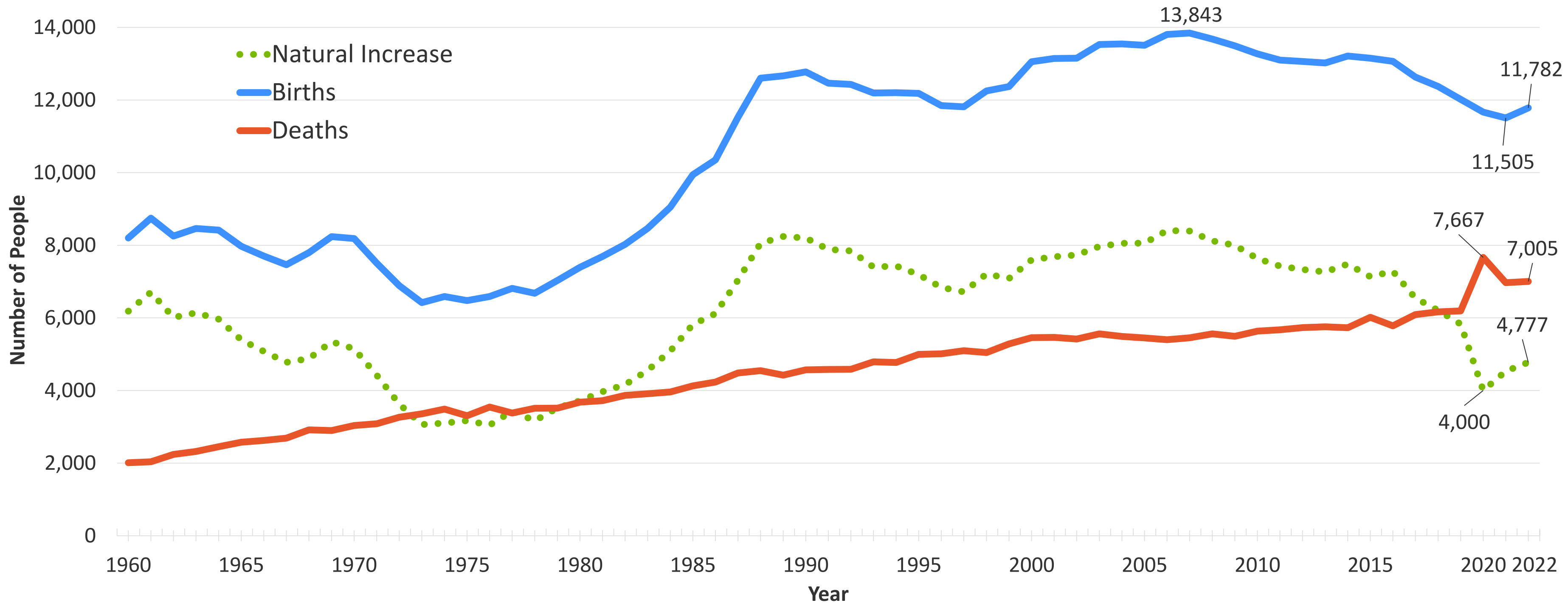
Components of Annual Population Growth, Montgomery County, 1990-2022



Sources: 1990-2022 Population Estimates, U.S. Census Bureau.

Number of births at lowest point since 1987

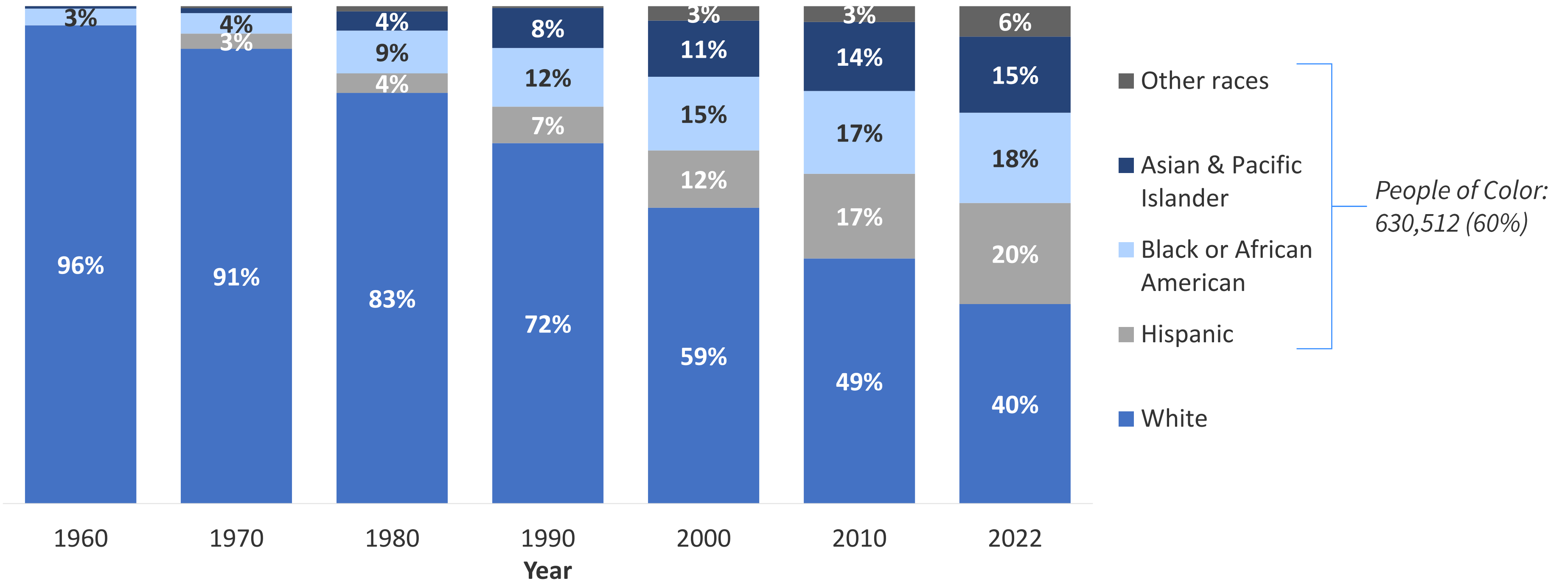
Natural Increase: Births and Deaths, Montgomery County, 1960-2022



Sources: 1960-2021 Maryland Vital Statistics Annual Reports, Maryland Department of Health, Vital Statistics Administration; CDC WONDER online database, National Center for Health Statistics (2022).

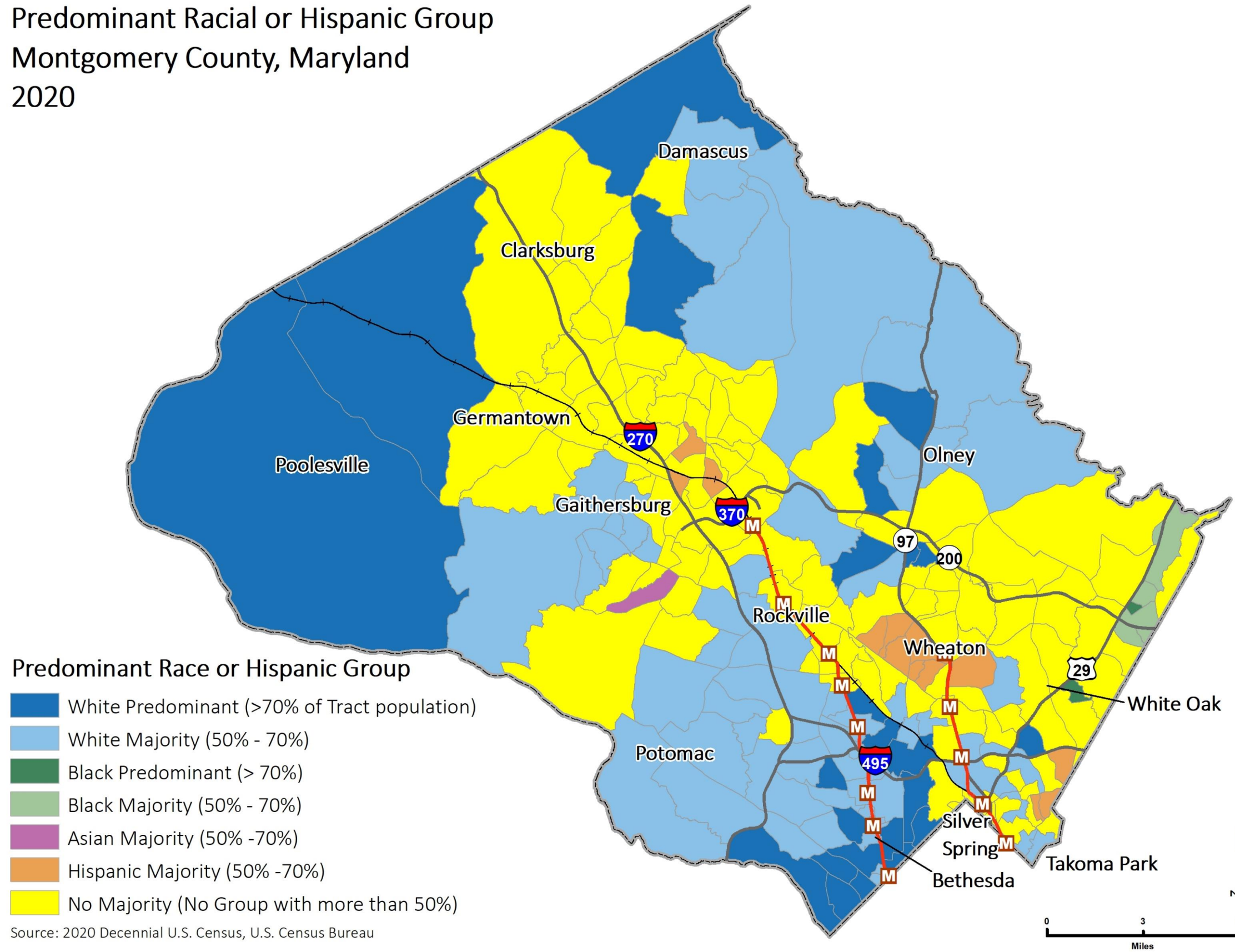
Increasing racial and ethnic diversity

Percent of Total Population by Race and Ethnicity, Montgomery County, 1960-2022



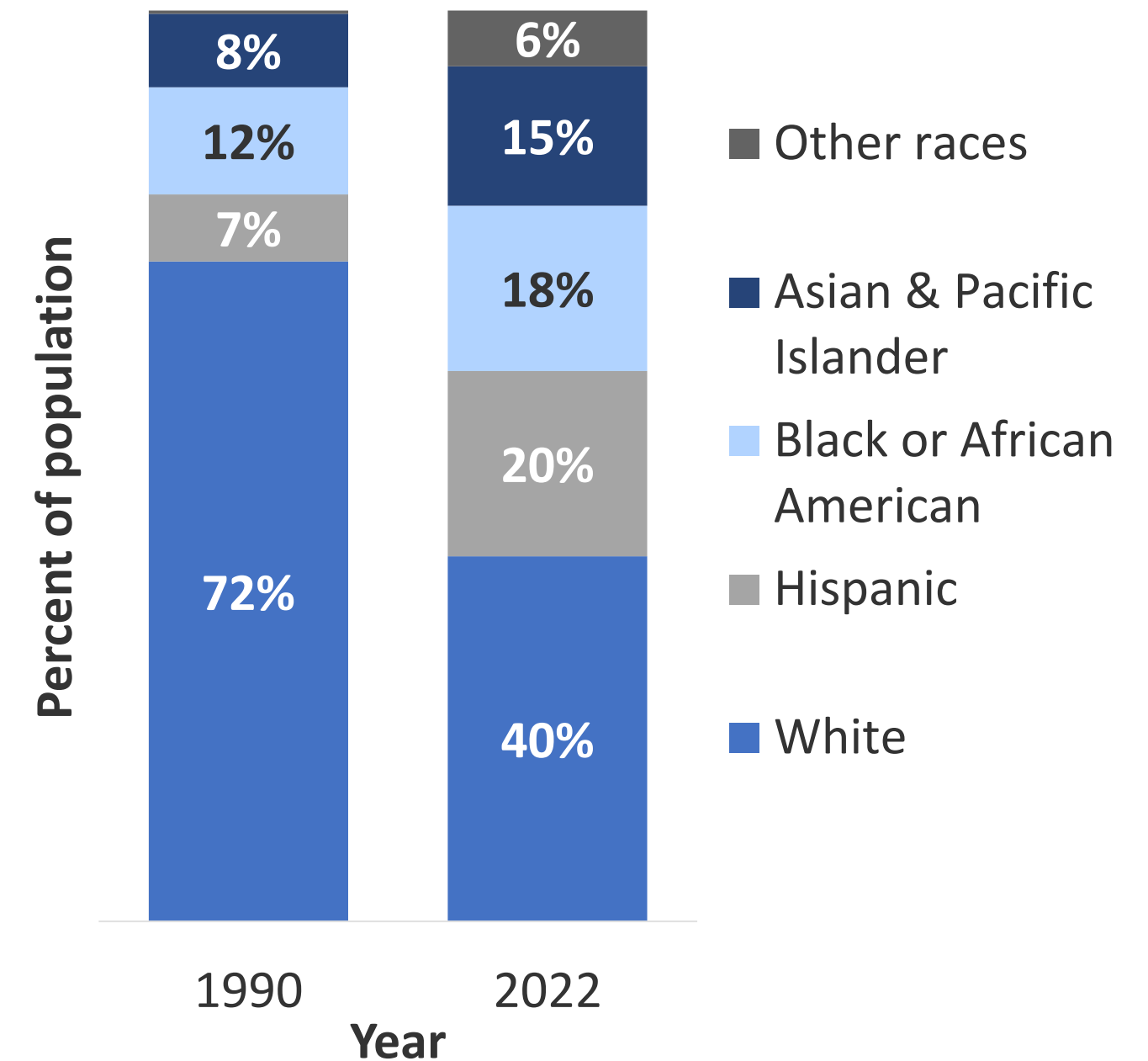
Note: Numbers may not add up to 100% due to rounding. "White", "Black or African American", "Asian & Pacific Islander", and "Other races" refer to the non-Hispanic population of these racial groups. Sources: 1960-2010 Decennial Censuses and 2022 American Community Survey, 1-year estimates, U.S. Census Bureau.

Predominant Racial or Hispanic Group
Montgomery County, Maryland
2020



Increasing racial & ethnic diversity

People of Color: 630,512 (60%)

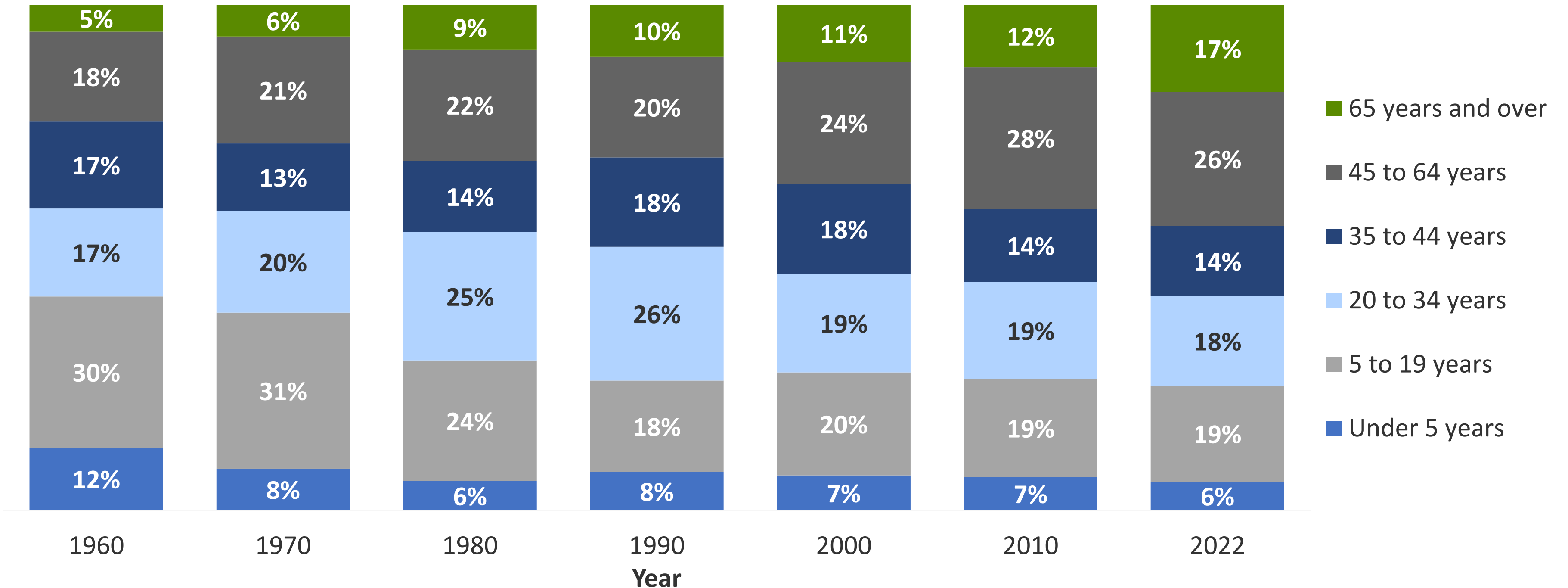


Note: Numbers may not add up to 100% due to rounding. "White", "Black or African American", "Asian & Pacific Islander", and "Other races" refer to the non-Hispanic population of these racial groups.

Sources: 1990 Decennial Census and 2022 American Community Survey, 1-year estimates, U.S. Census Bureau.

Increasingly aging population

Percent of Total Population by Age, Montgomery County, 1960-2022

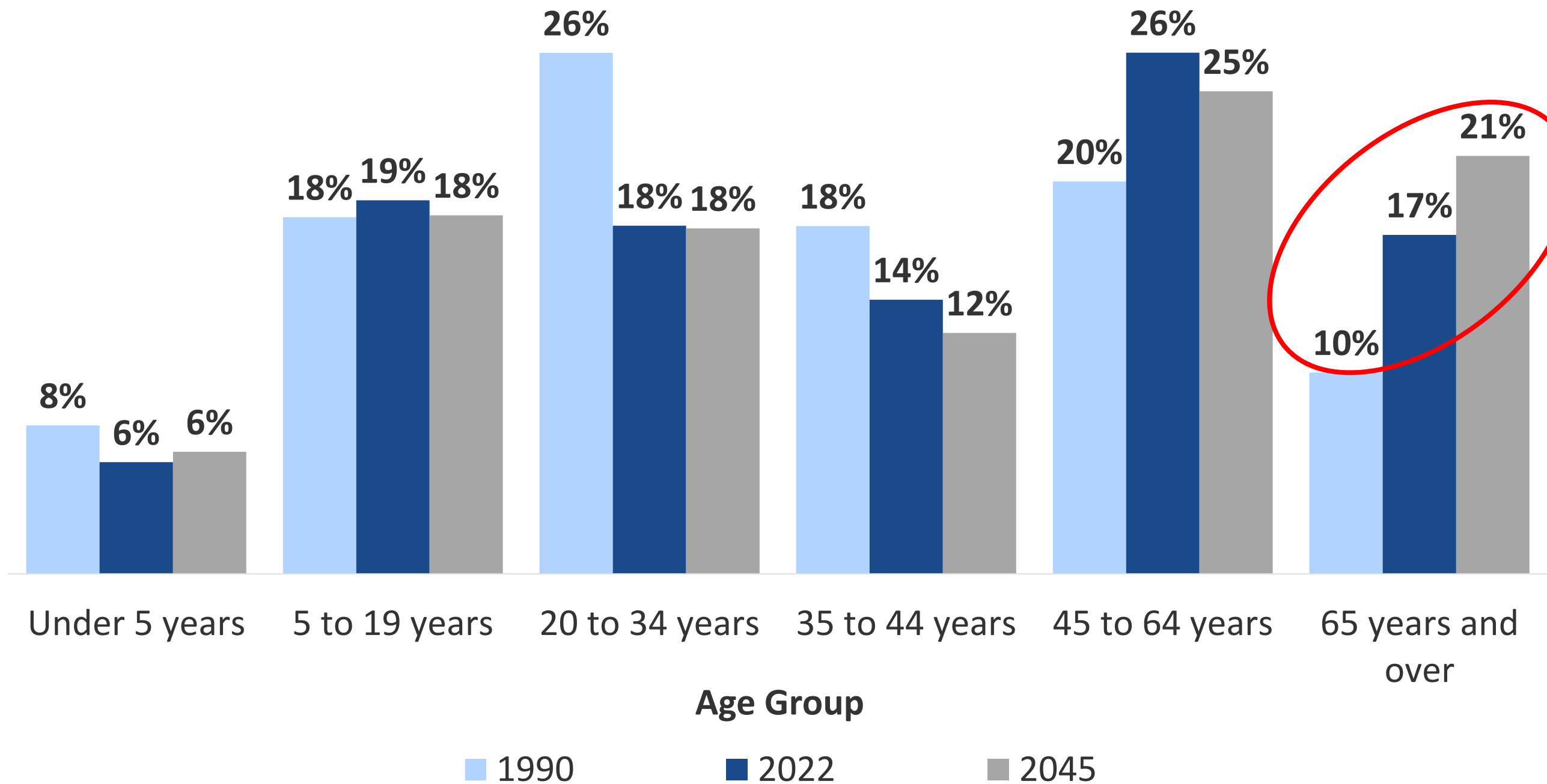


Note: Numbers may not add up to 100% due to rounding.

Sources: 1960-2010 Decennial Censuses and 2022 American Community Survey, 1-year estimates, U.S. Census Bureau.

Older projected population

Population by Age, Montgomery County, 1990-2045



Aging baby boom generation:

- 1990: ages 26 to 44
- 2022: ages 58 to 76
- Age 65+ population: Forecasted to increase from 17% in 2022 to 21% in 2045

18% of residents are young adults ages 20 to 34 in 2022

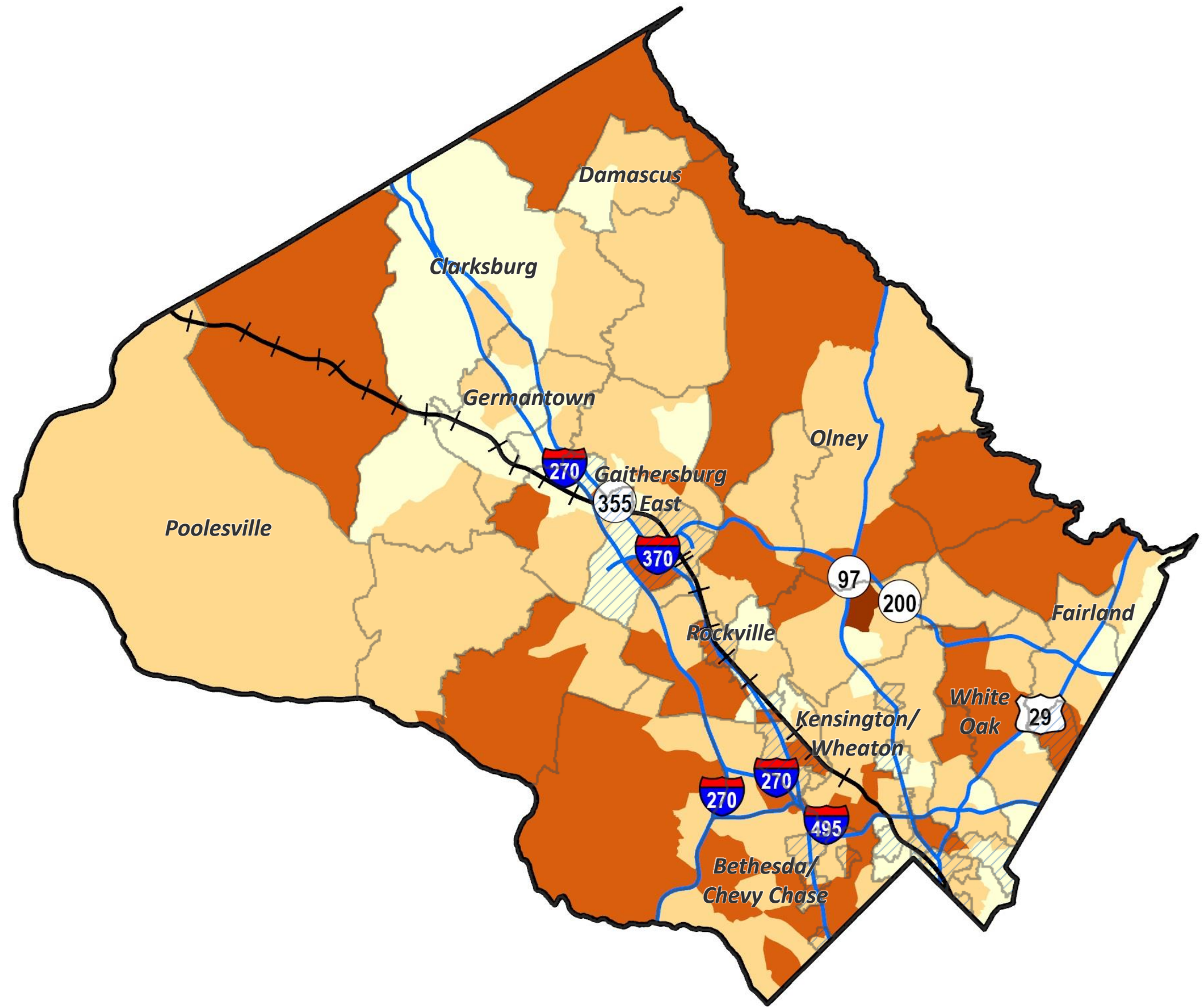
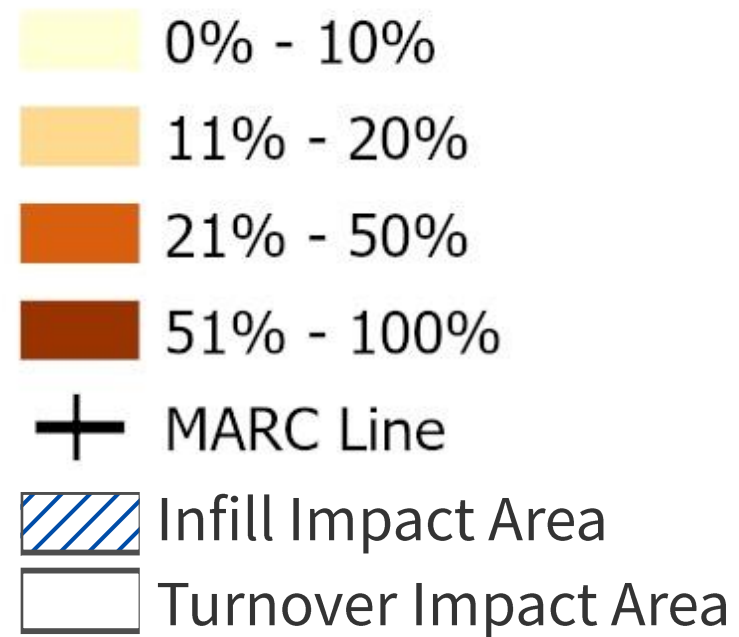
23% of residents are children under 18 in 2022

Note: Numbers may not add up to 100% due to rounding.

Sources: 1990 Decennial Census and 2022 American Community Survey, 1-year estimates, U.S. Census Bureau; Projections to 2045, Maryland Department of Planning.

Percent of People Ages 65 and Older 2021 by Census Tract

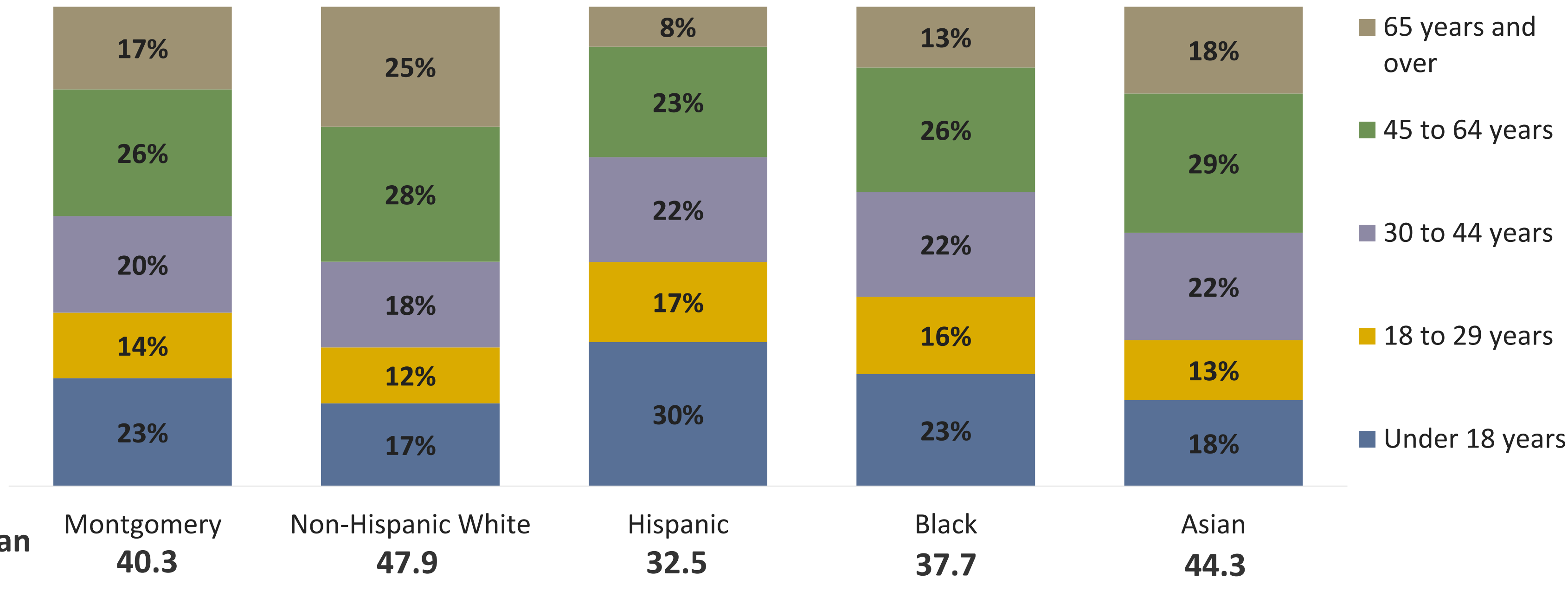
Percent of People Aged 65+



Source: 2021 American Community Survey, 5-year estimates, U.S. Census Bureau.

Youthful people of color and aging white baby boomers

Race & Hispanic Origin by Age, Montgomery County, 2022



Note: Numbers may not add up to 100% due to rounding.

Source: 2022 American Community Survey, 1-year estimates, U.S. Census Bureau.

Aging Homeowners

Increase in age 55+ homeowners

- 34% in 1990
- 55% in 2022

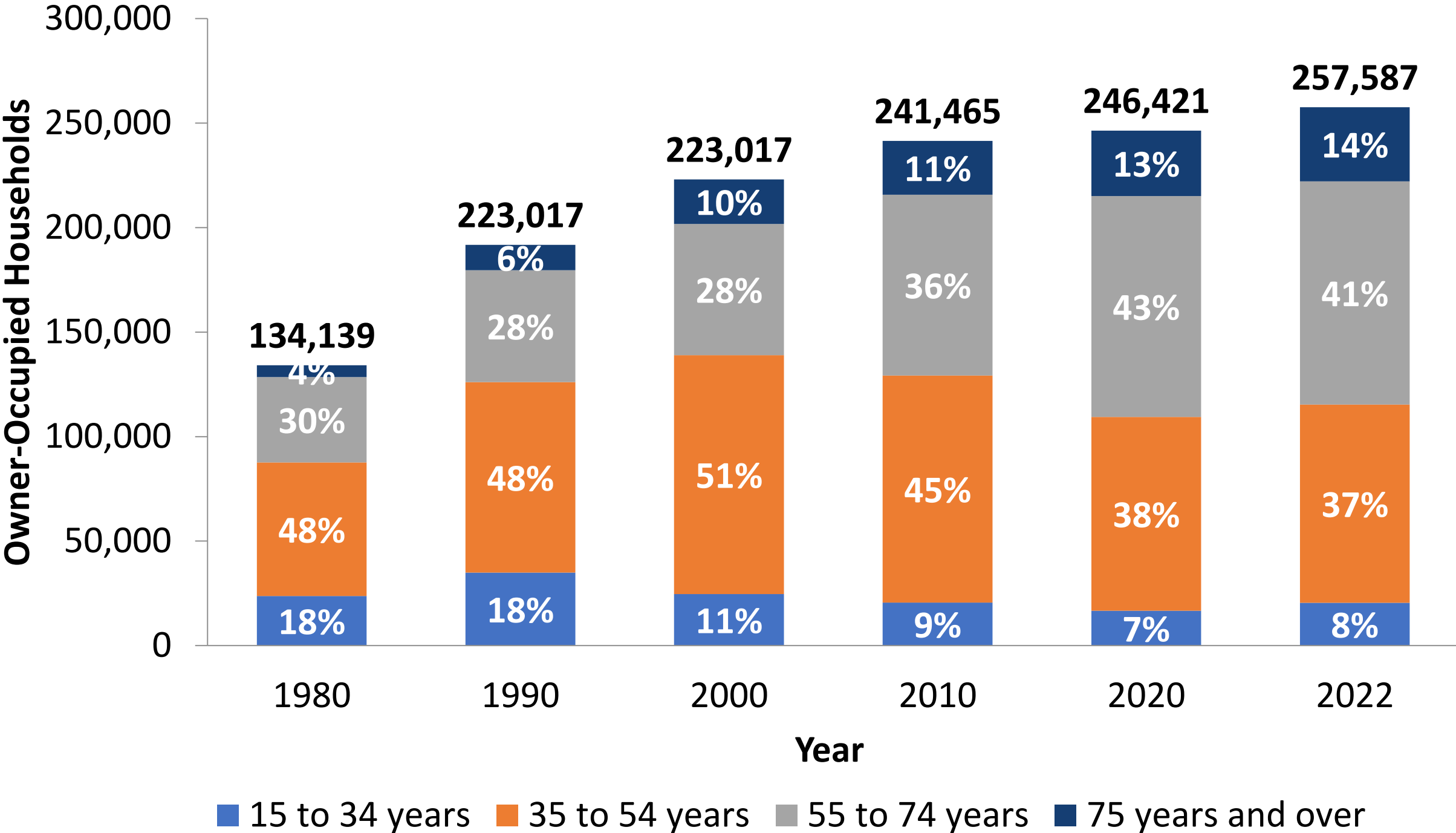
Decrease in the number of younger homeowners

- 18% in 1990
- 8% in 2022

Demand Shifts

- Population Changes
- Millennial tastes & preferences
- Affordability
- Product Diversity

Owner-Occupied Households by Householder Age, Montgomery County, 1980-2022

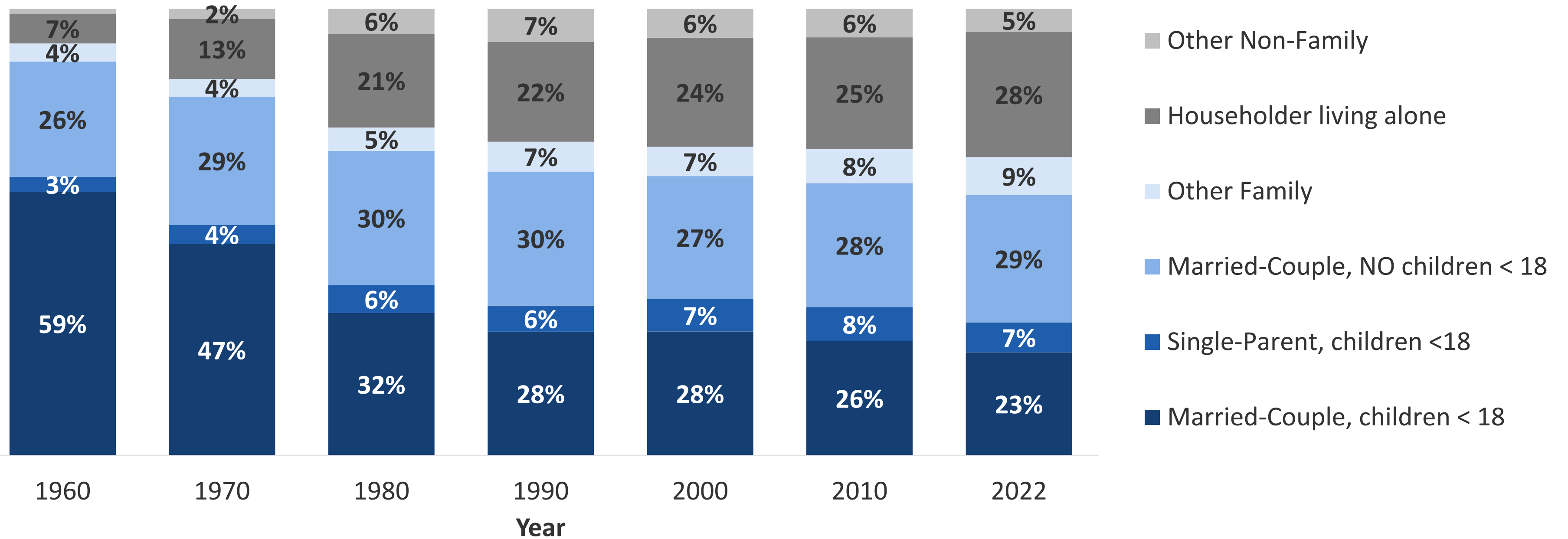


Note: Numbers may not add up to 100% due to rounding.

Sources: 1980-2020 Decennial Censuses and 2022 American Community Survey, 1-year estimates, U.S. Census Bureau.

Wider Variety of Household Types Since 1960, but Distribution Relatively Stable Since 1990

Percent of Households by Type, Montgomery County, 1960-2022

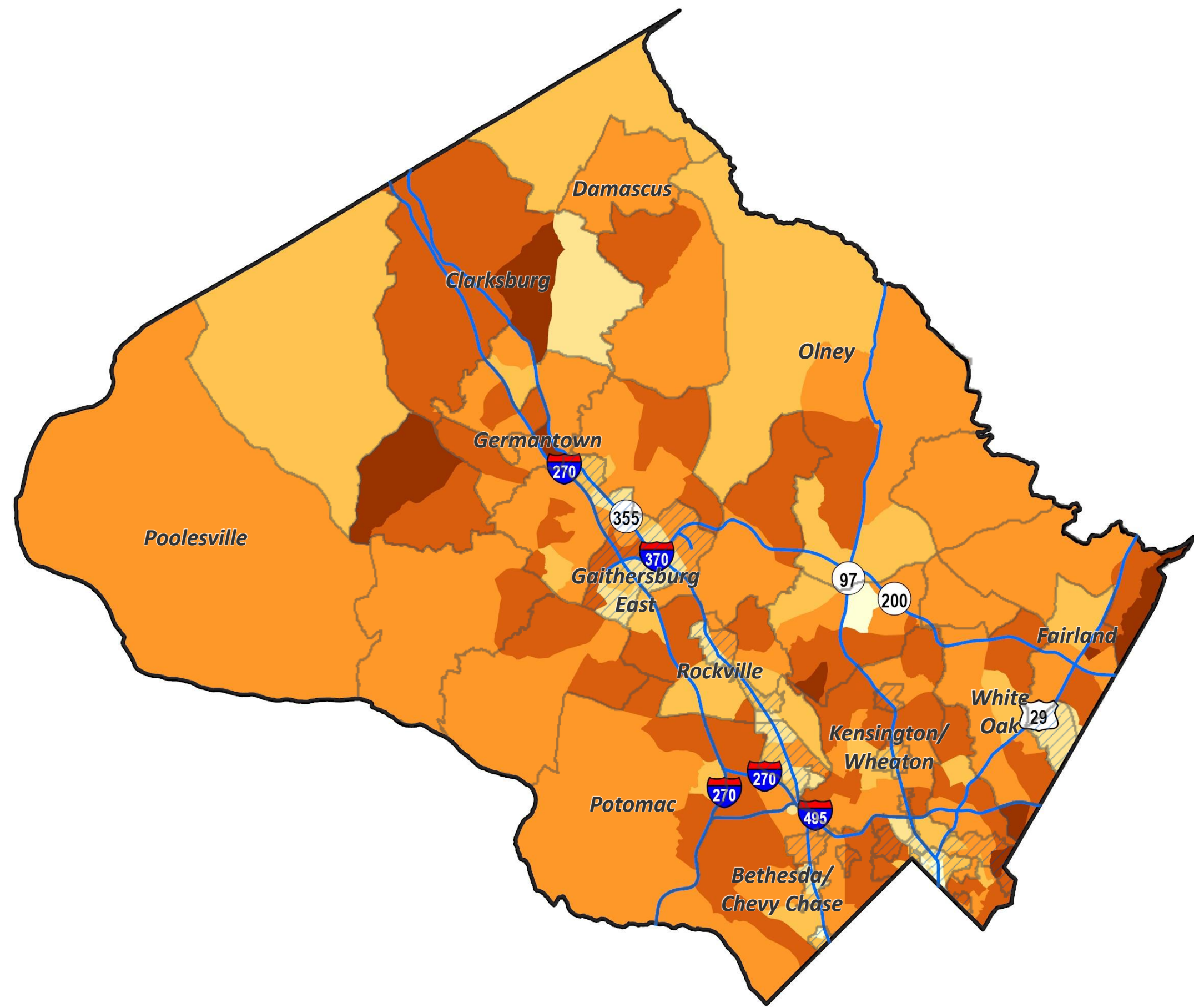
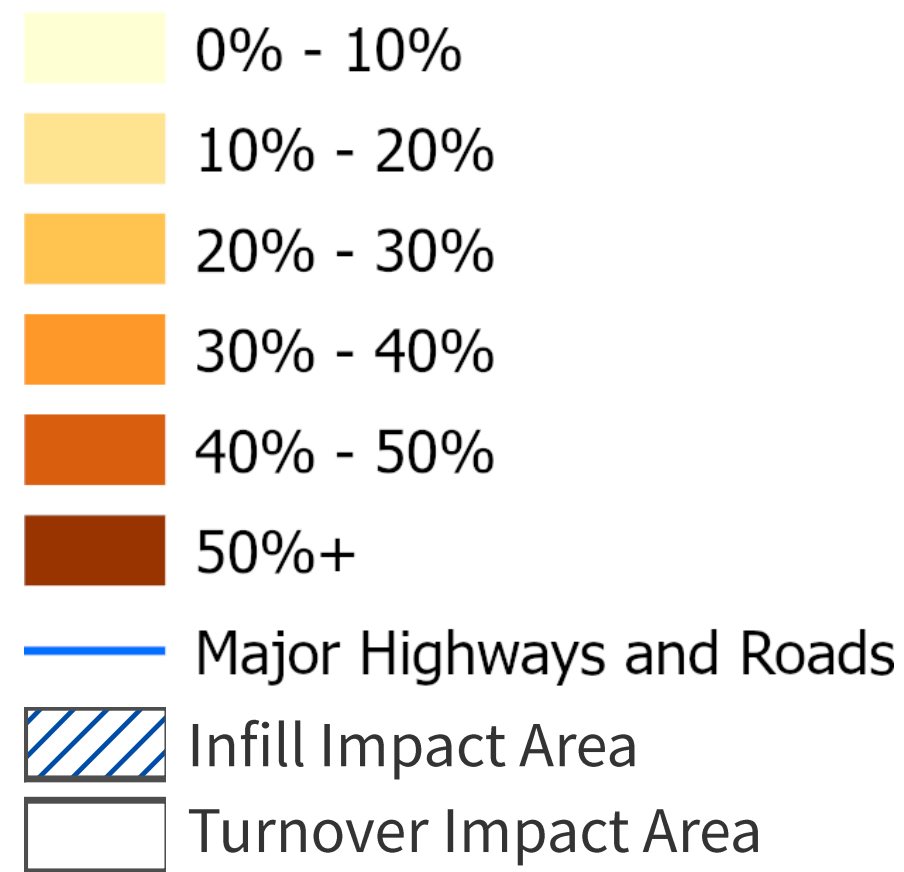


Note: Numbers may not add up to 100% due to rounding.

Sources: 1960-2010 Decennial Censuses and 2022 American Community Survey, 1-year estimates, U.S. Census Bureau.

Percent of Households with Children Under 18 2021 by Census Tract

Percent of Households with Children Under 18

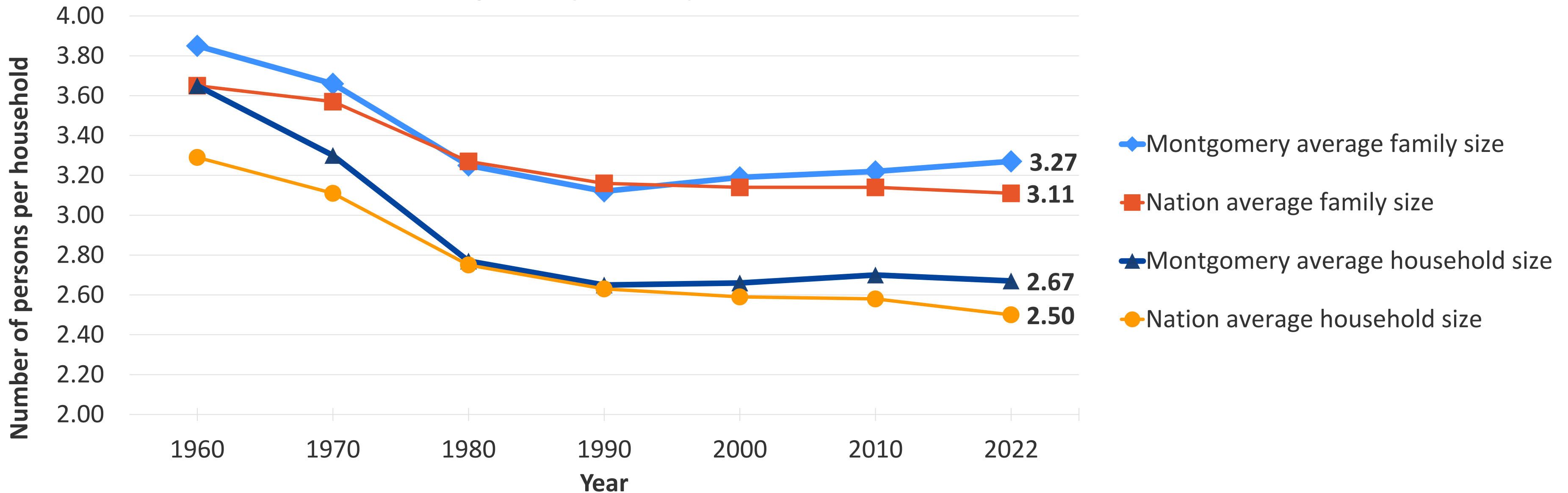


* Not all households contain families since a household may comprise a group of unrelated people or one person living alone.

Source: 2021 American Community Survey, 5-year estimates, U.S. Census Bureau.

Small growth in average household and family size since 1990

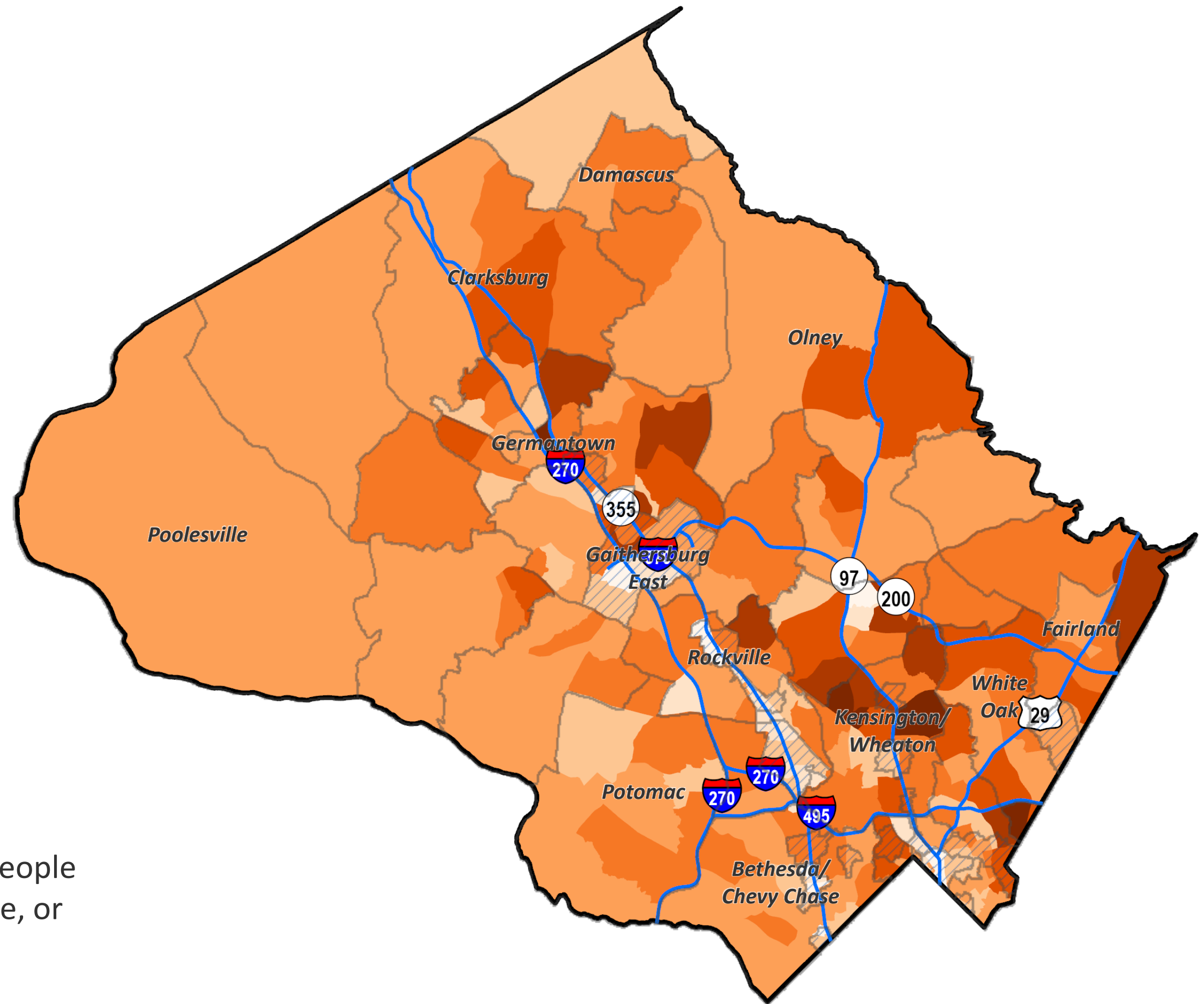
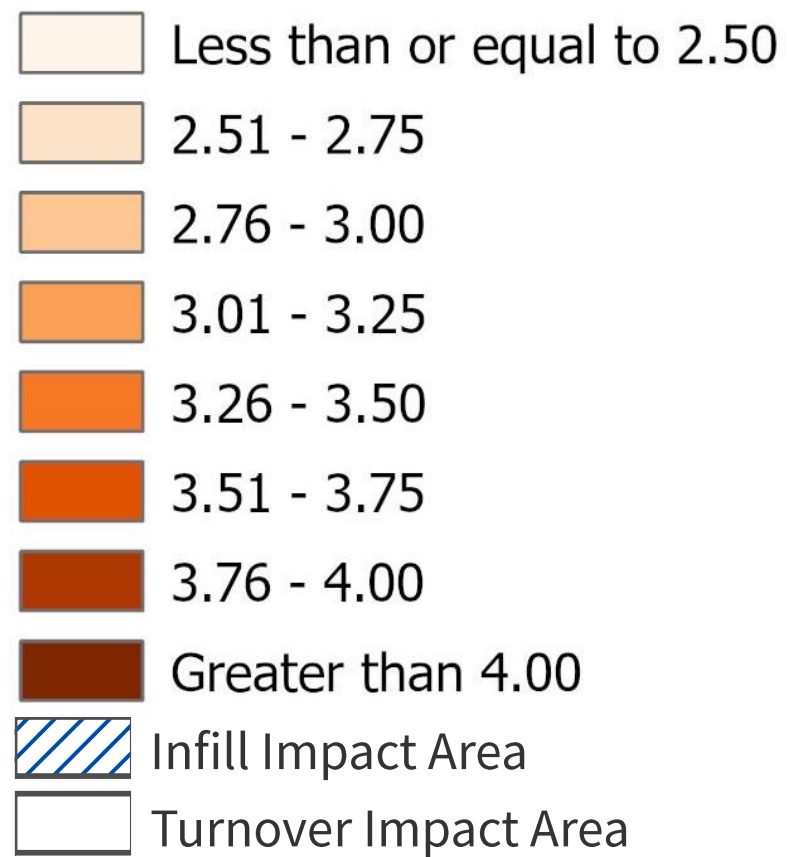
Average Household and Family Size, Montgomery County and United States, 1960-2022



Sources: 1960-2010 Decennial Censuses and 2022 American Community Survey, 1-year estimates, U.S. Census Bureau.

Average Family Size 2021 by Census Tract

Average Family Size

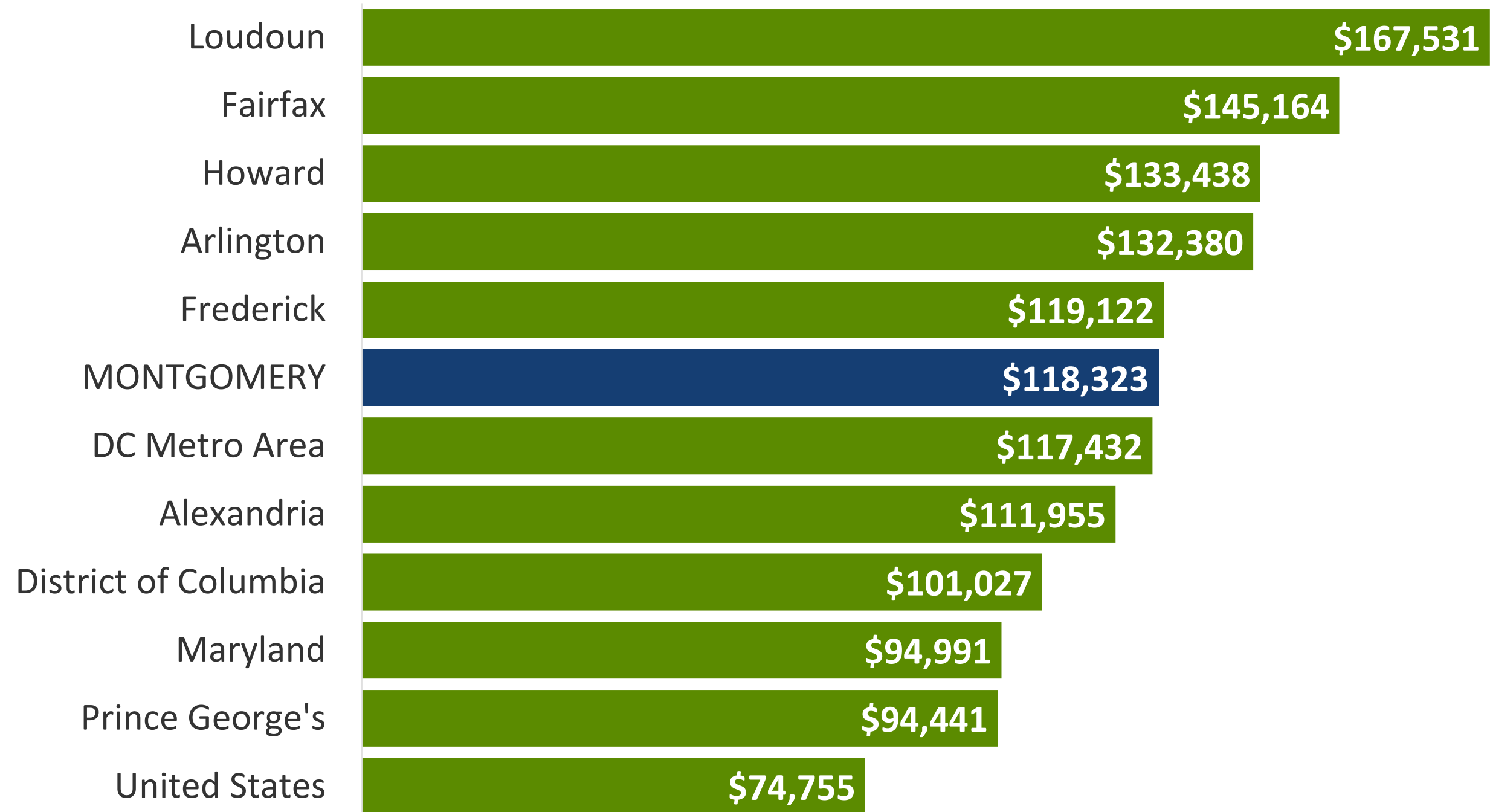


* A family includes a householder and one or more people who are related to the householder by birth, marriage, or adoption living in the same household.

Source: 2021 American Community Survey, 5-year estimates, U.S. Census Bureau.

Consistently high-ranking median income in region

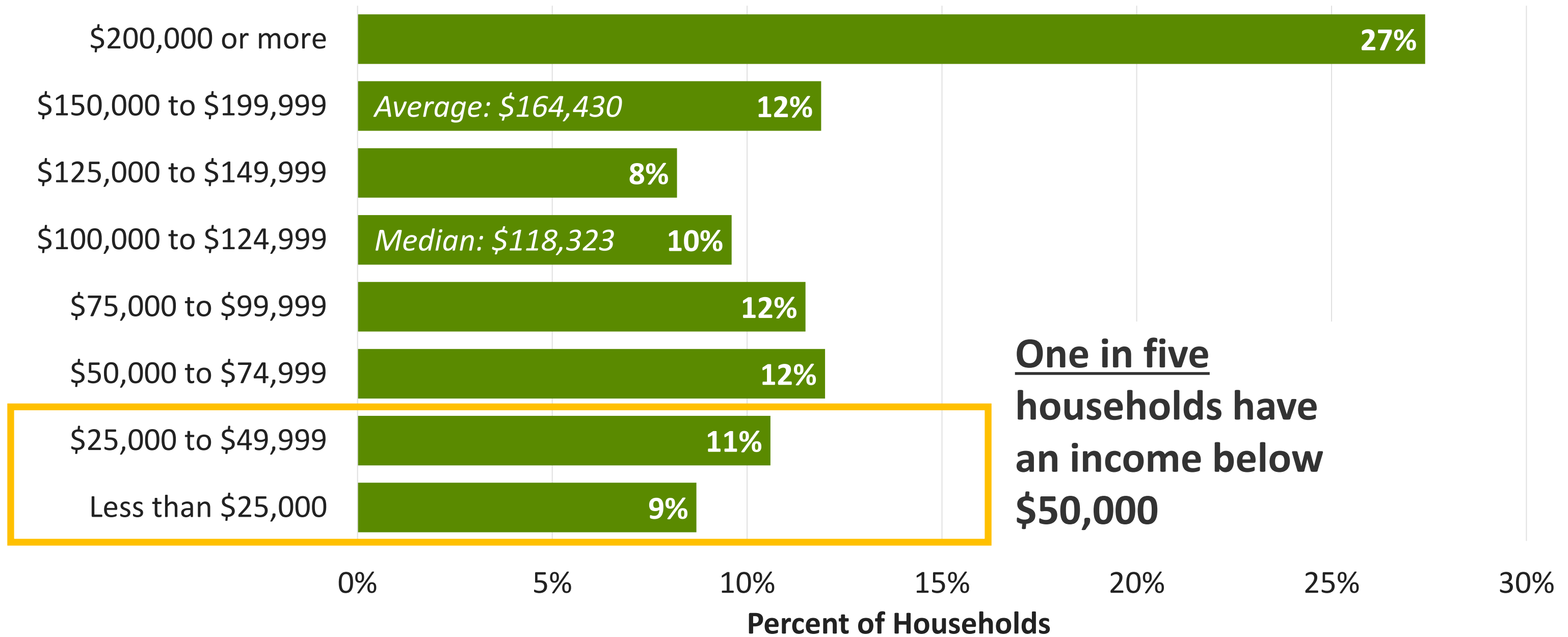
2022 Median Household Income



Source: 2022 American Community Survey, 1-year estimates, U.S. Census Bureau.

Many households are very wealthy but many others are low-income

Montgomery County, 2022 Household Income Distribution

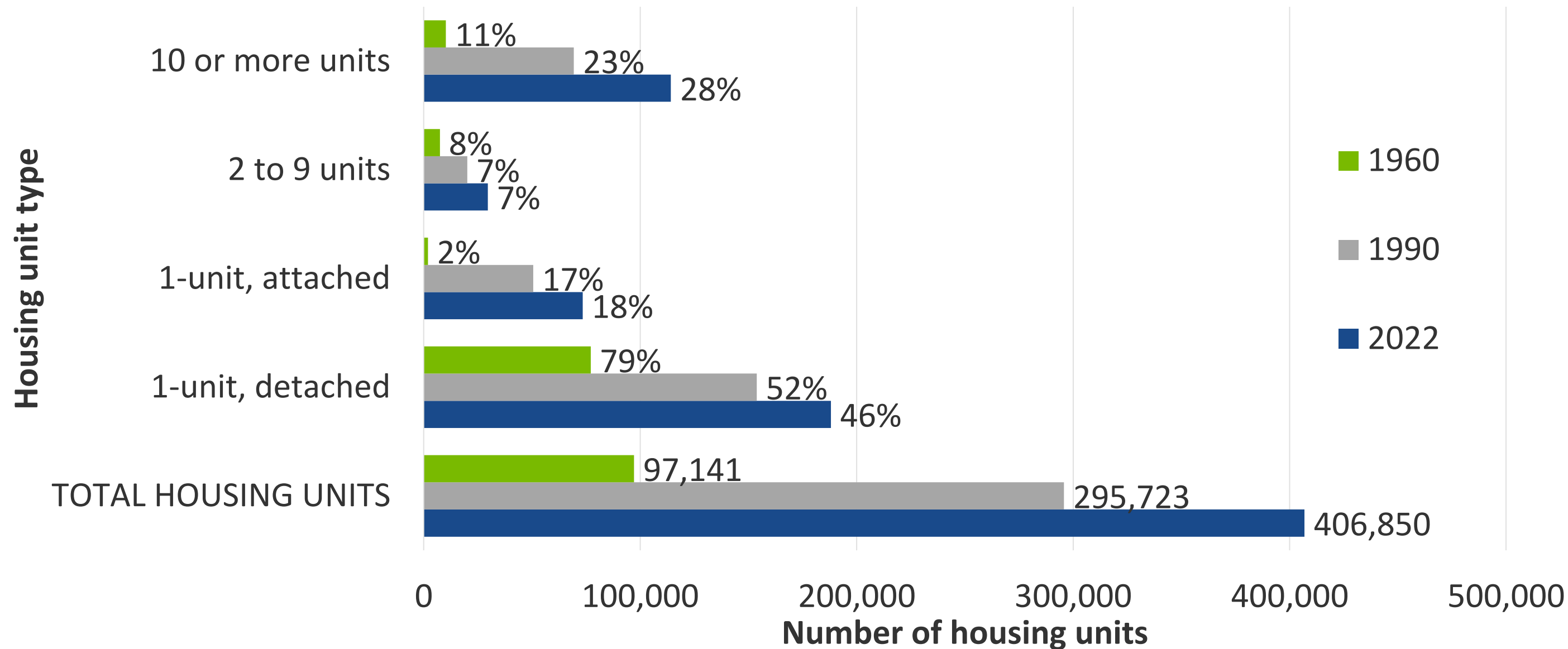


Note: Numbers may not add up to 100% due to rounding.

Source: 2022 American Community Survey, 1-year estimates, U.S. Census Bureau.

Multifamily housing growth outpacing all other housing types

Housing Units by Type, Montgomery County, 1960-2022



From 1990 to 2022:

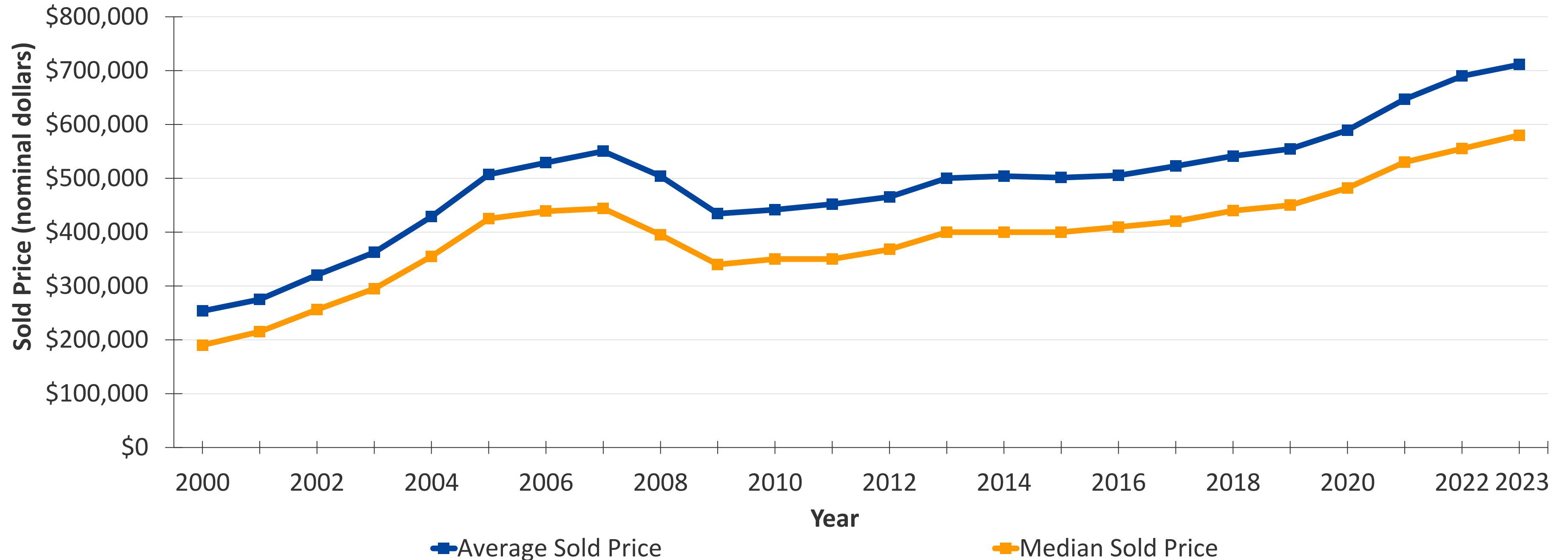
- **38% increase** in the number of housing units from 295,723 to 406,850
- **61% increase** in the number of multi-family units
- **28% increase** in the number of single-family units

Note: For each housing unit type, the bar size indicates the number of units by category, and the percentage is the share of the total number of housing units for each year. Numbers may not add up to 100% due to rounding.

Sources: 1960 and 1990 Decennial Censuses and 2022 American Community Survey, 1-year estimates, U.S. Census Bureau.

For-Sale Homes Sold Price

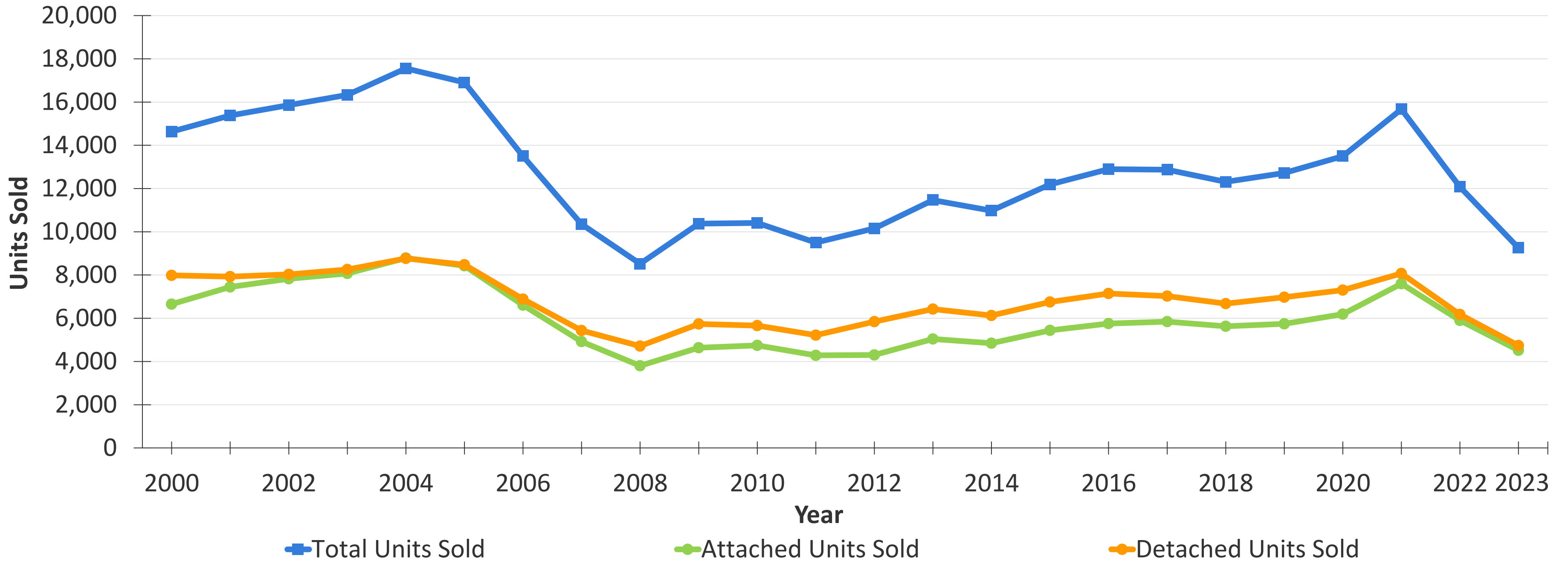
For-Sale Homes Average and Median Sold Price: Montgomery County, 2000-2023



Source: MRIS.

For-Sale Homes – Units Sold

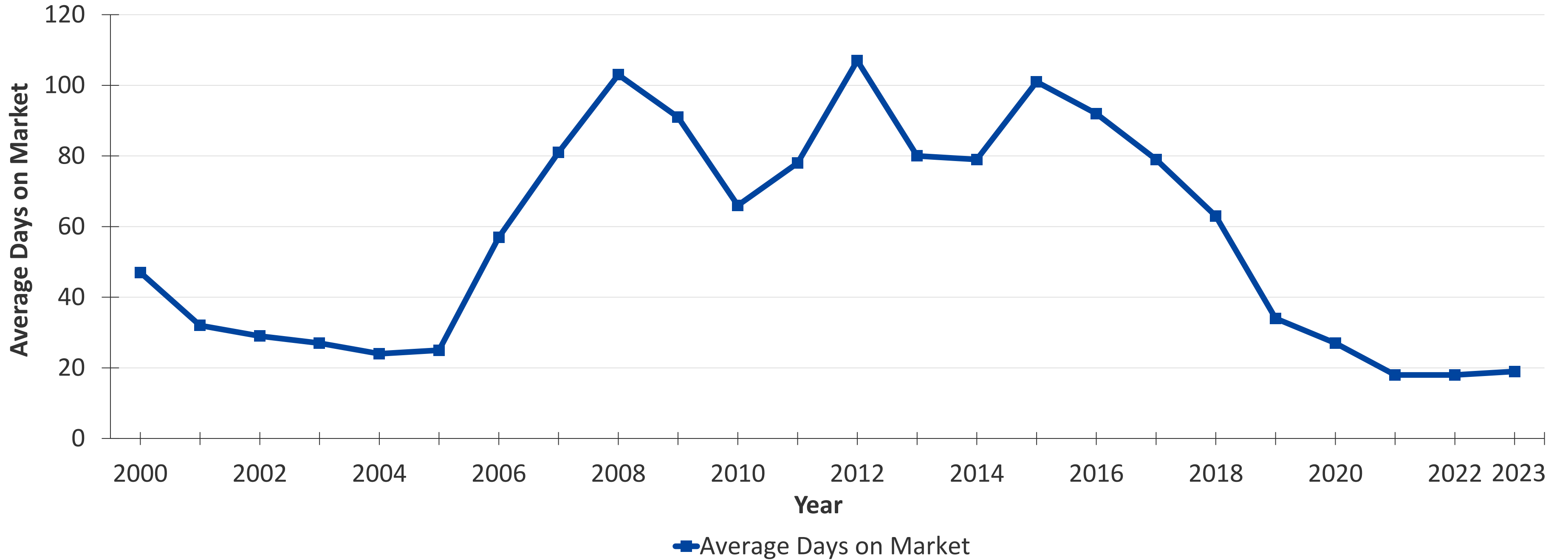
For-Sale Homes Units Sold: Montgomery County, 2000-2023



Source: MRIS.

For-Sale Homes – Days on Market

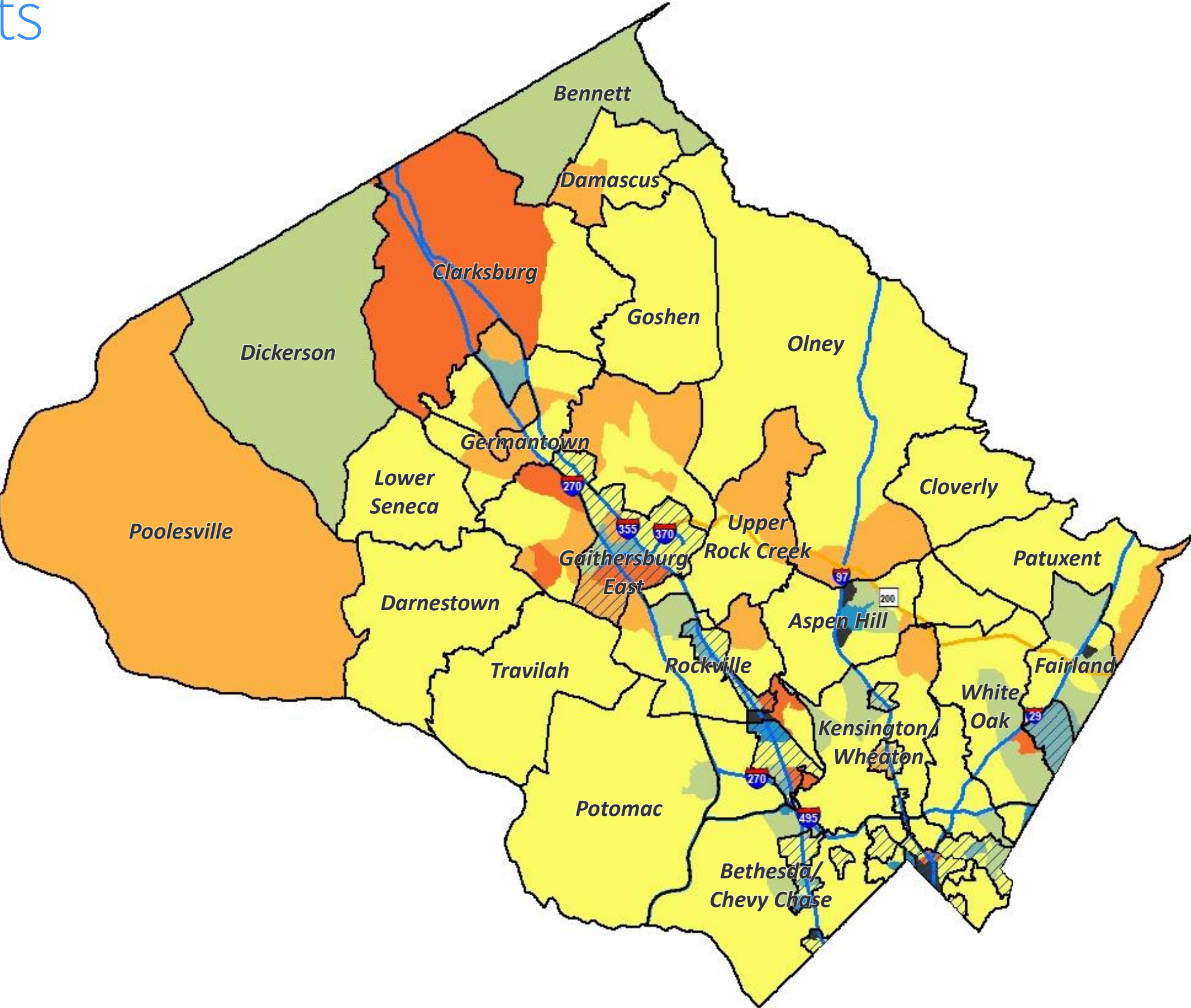
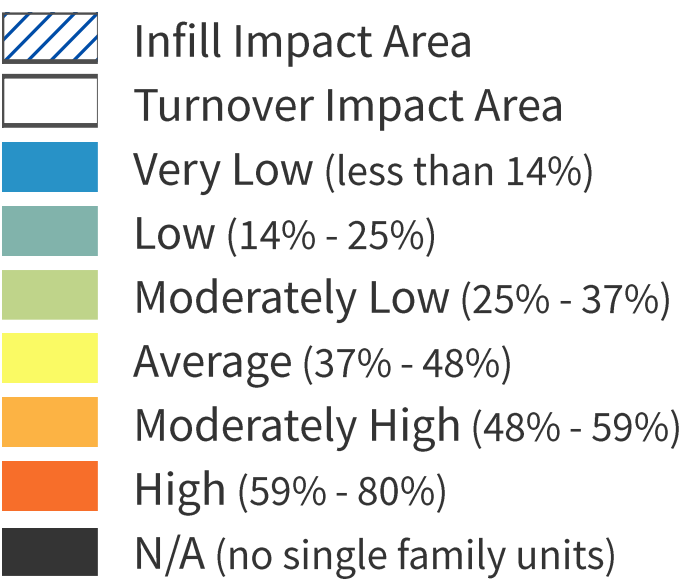
For-Sale Homes Average Days on Market: Montgomery County, 2000-2023



Source: MRIS.

Percent of Single Family Units Sold in Last 18 years

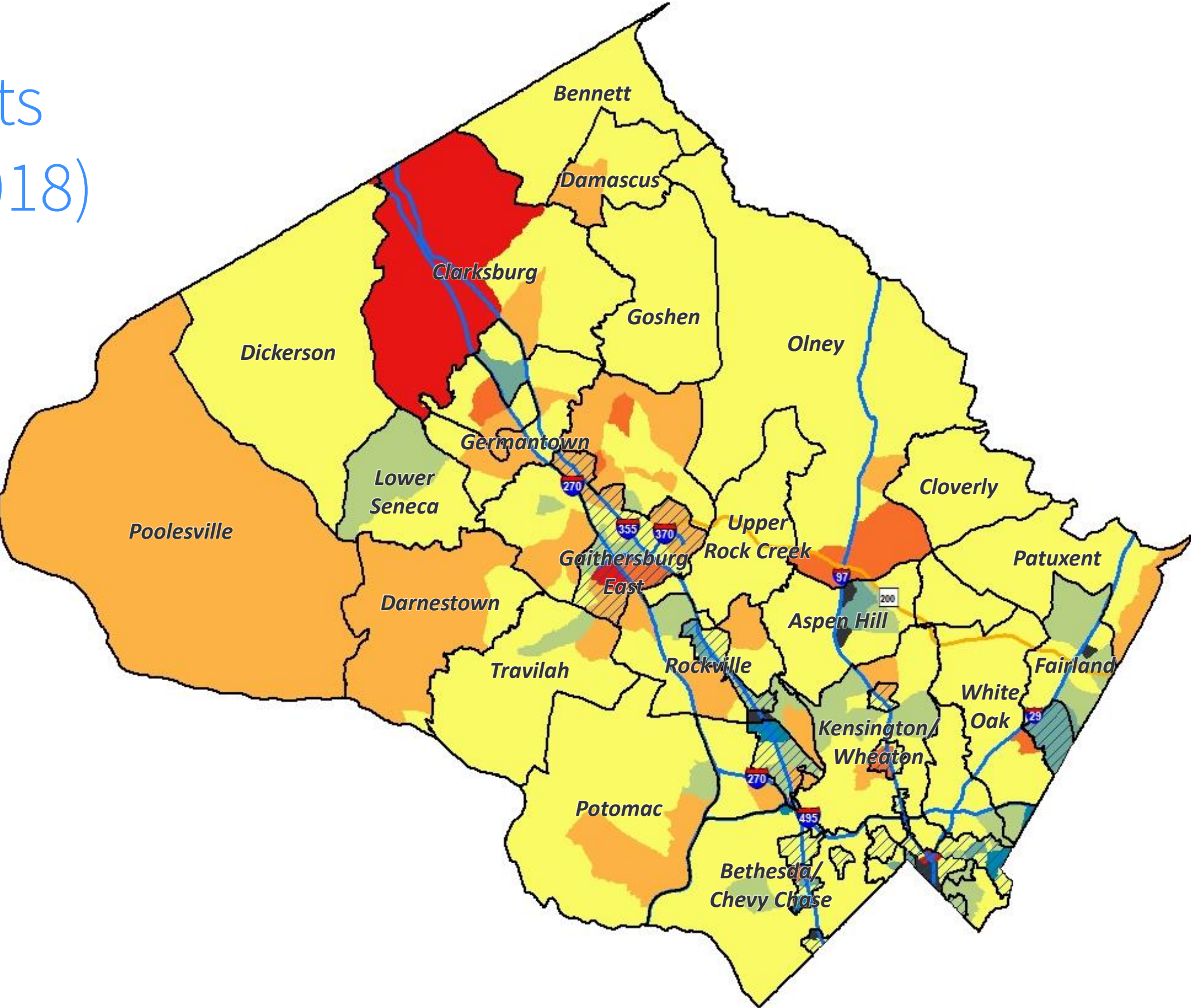
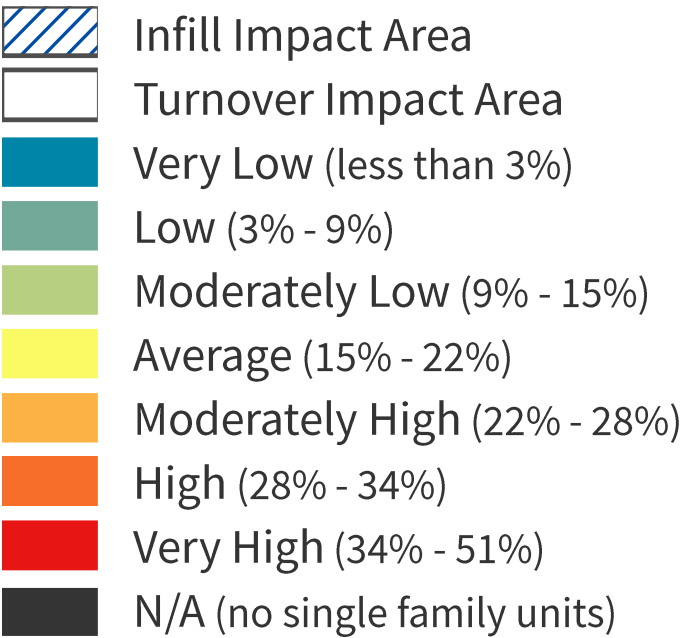
- Countywide : 43%



Source: SDAT

New Housing Sales Percent of Single Family Units Sold in Last 5 years (since 2018)

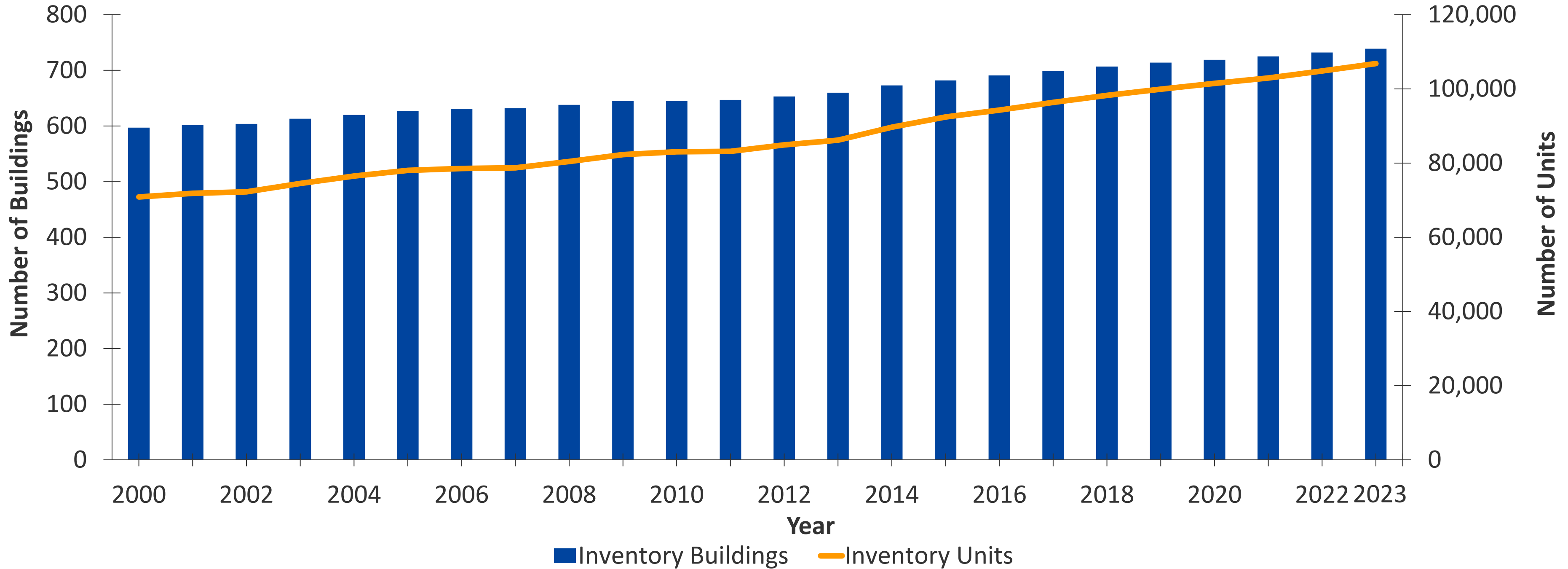
- Countywide : 19%



Source: SDAT

Rental Units Inventory

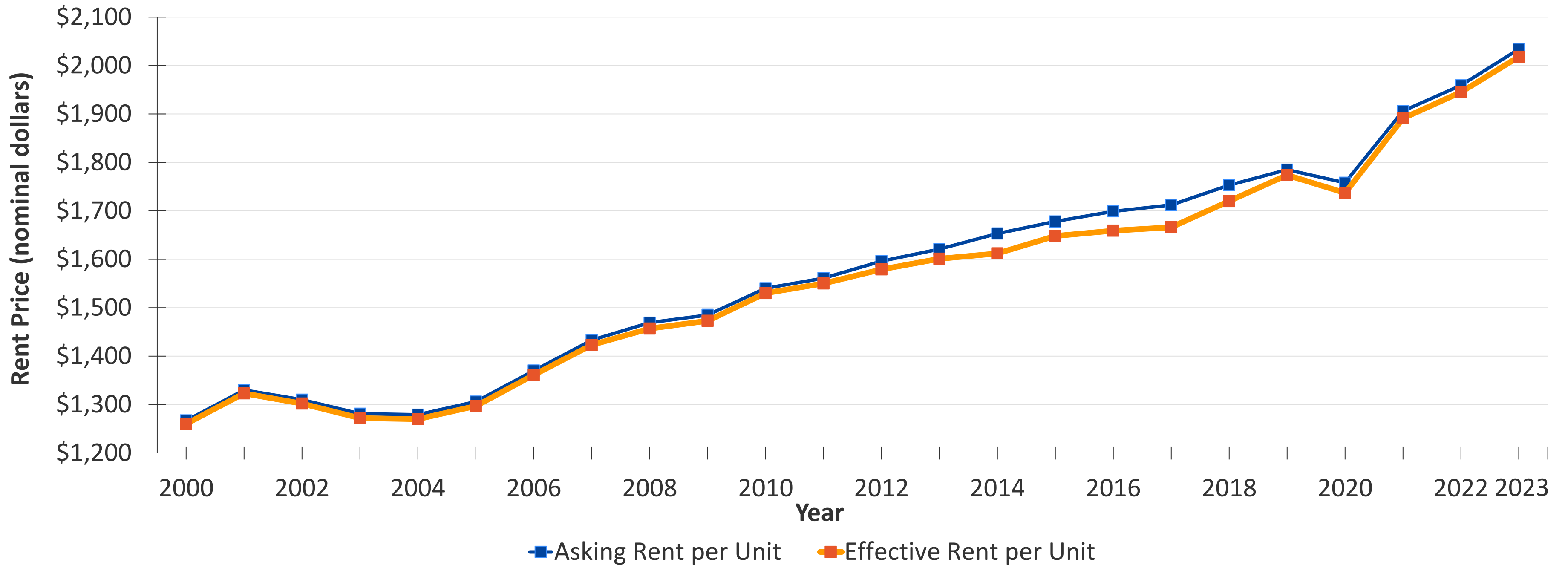
Rental Inventory: Montgomery County, 2000-2023



Source: CoStar.

Rental Units – Asking rent & Effective Rent

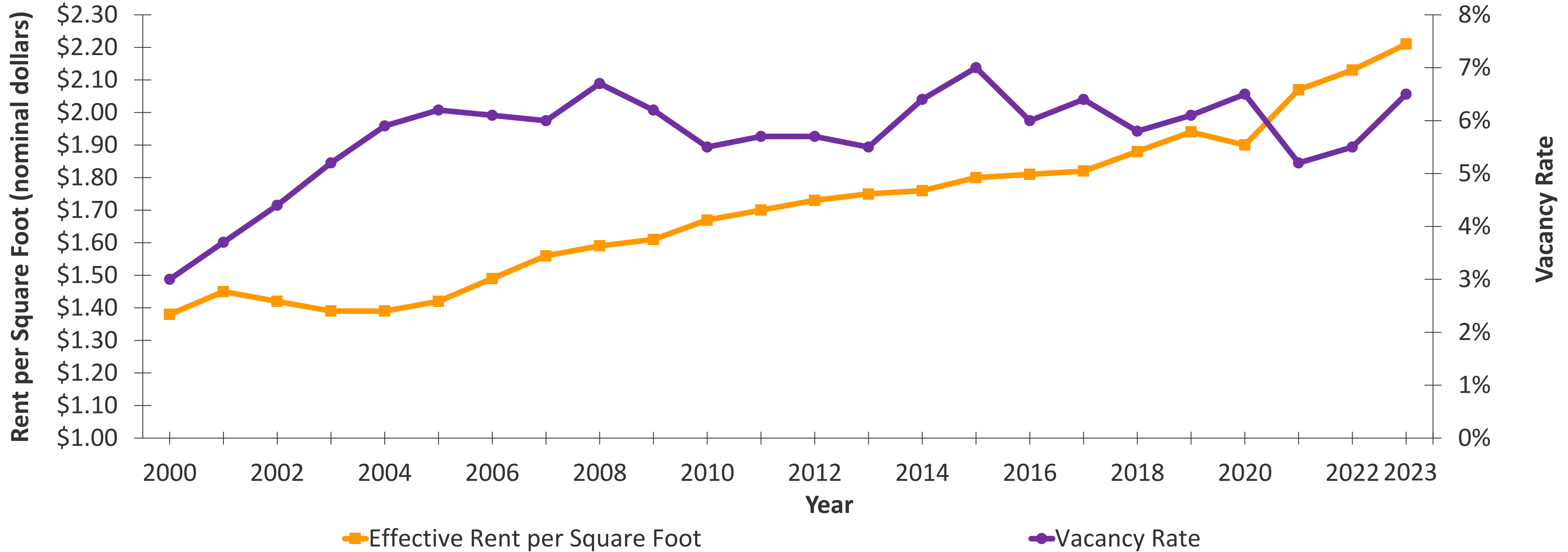
Asking Rent and Effective Rent per Unit: Montgomery County, 2000-2023



Source: CoStar.

Rental Units – Effective Rent & Vacancy Rate

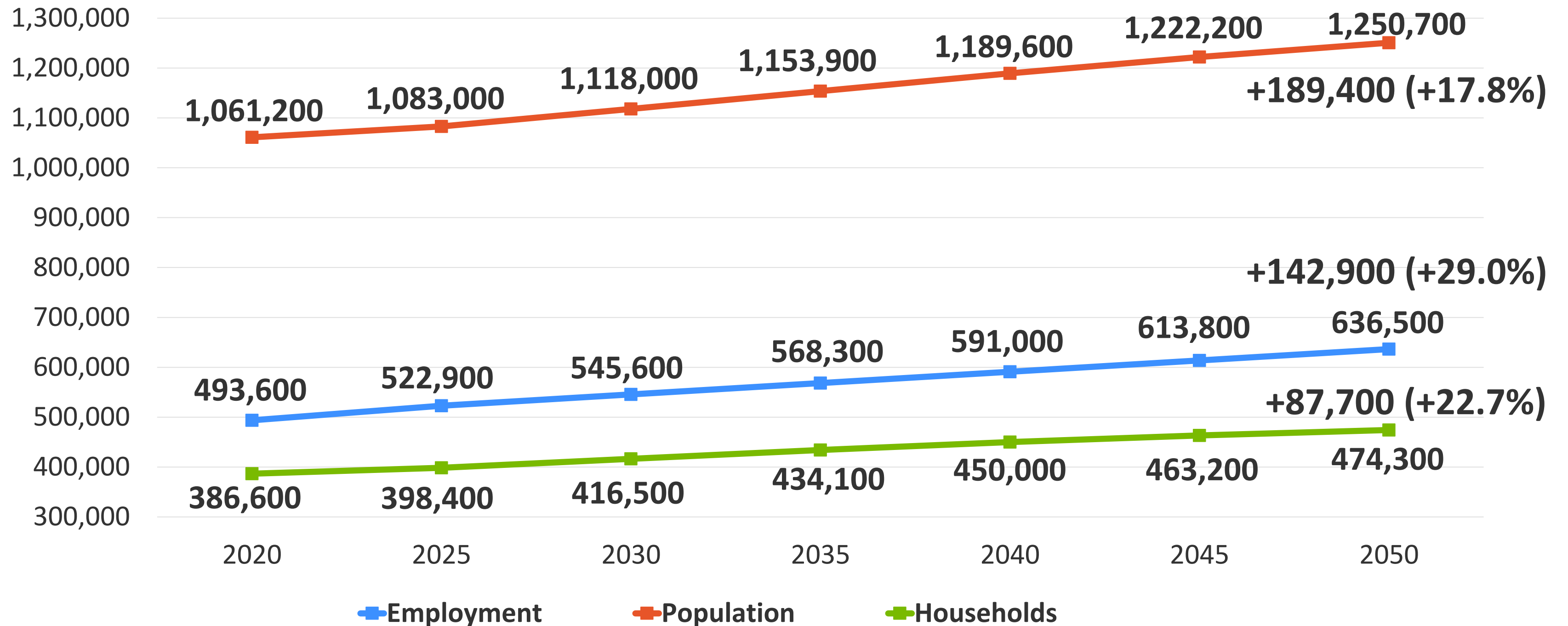
Effective Rent per Square Foot and Vacancy Rate: Montgomery County, 2000-2023



Source: CoStar.

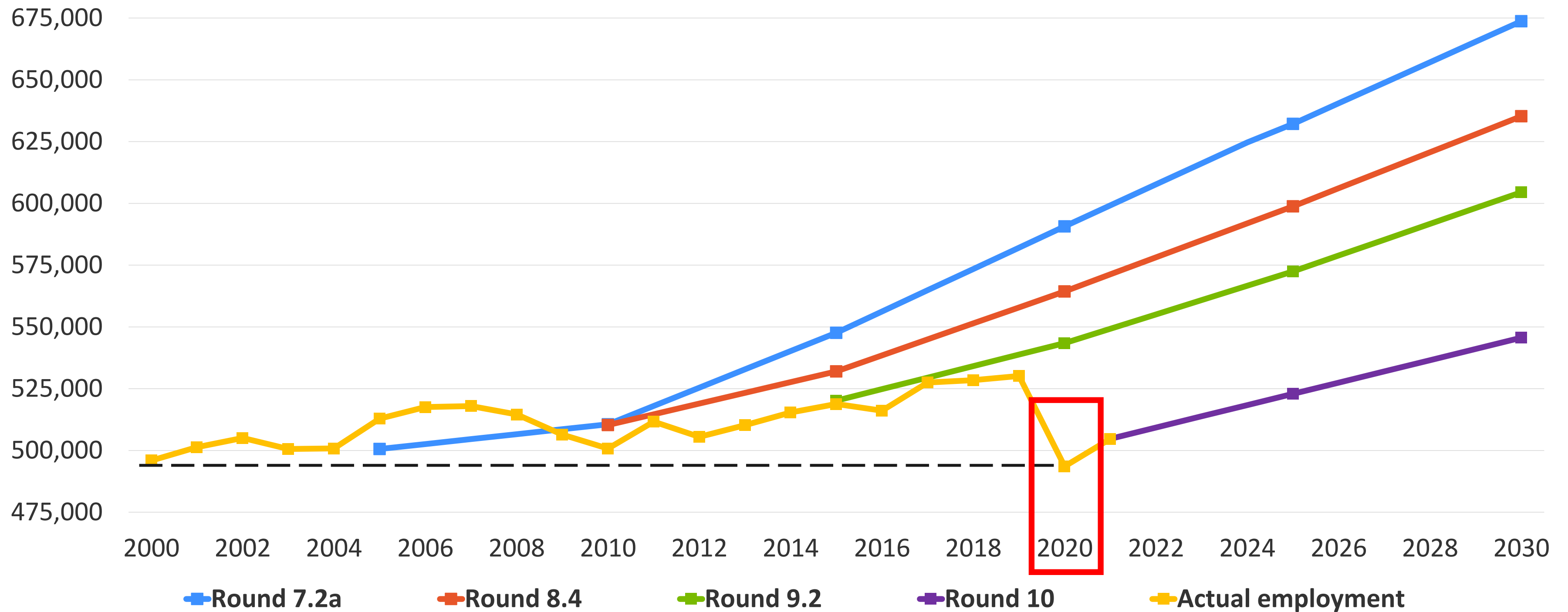
County Growth Forecasts

Population, Household, and Employment Forecast: Round 10 Totals for Montgomery County



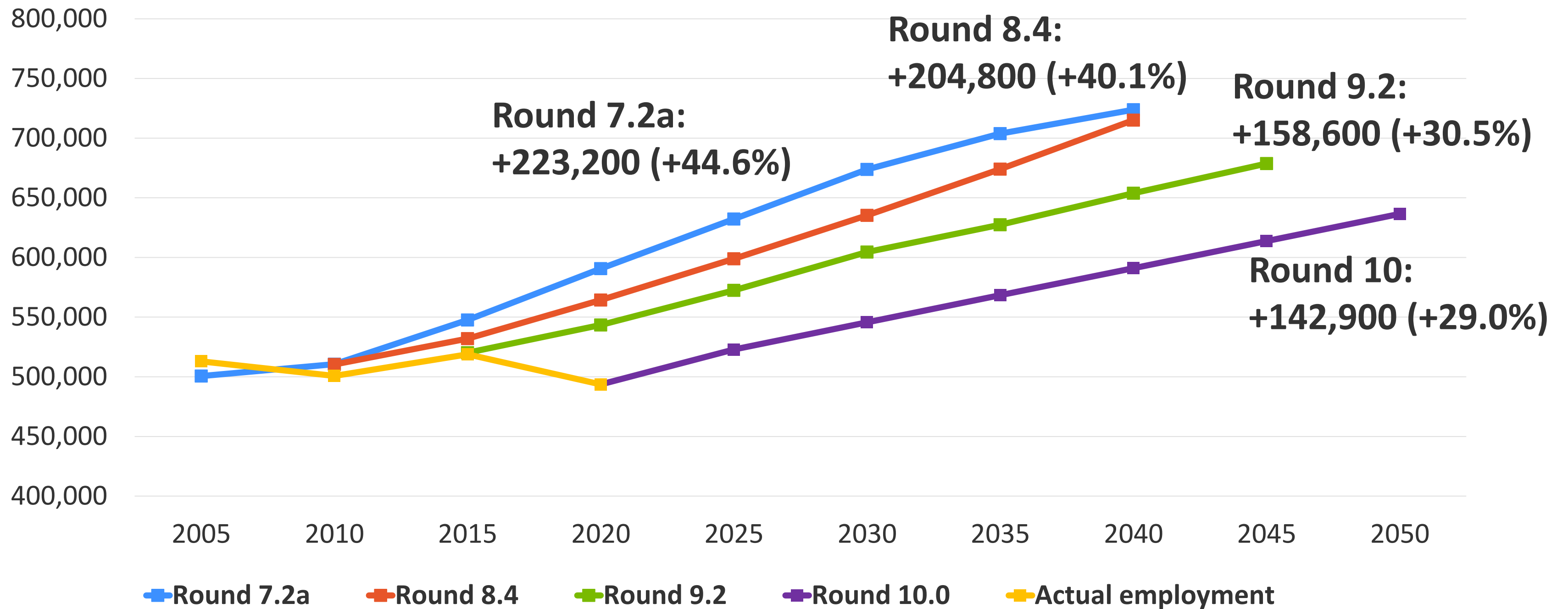
Note: Numbers for population, employment, households, and absolute change rounded to the nearest hundred. Numbers for absolute change and percent change calculated from unrounded numbers.
 Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

Recent Employment Trends: A Closer Look



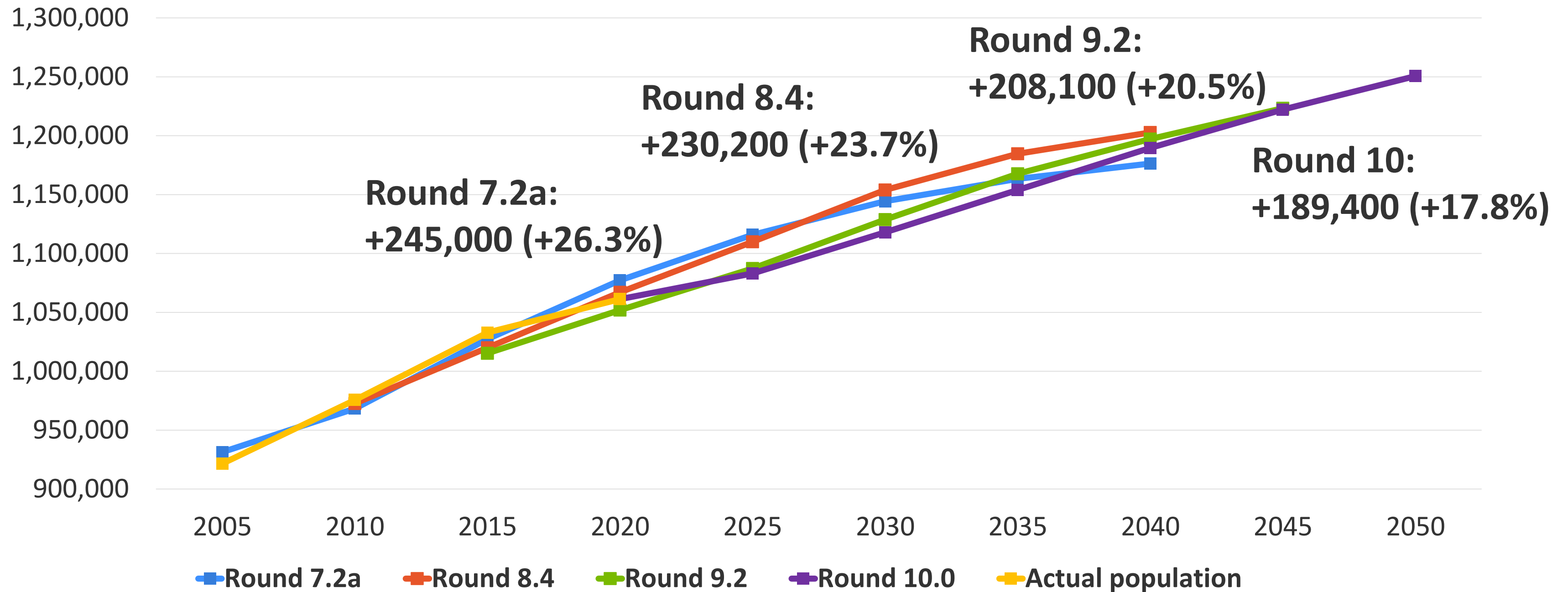
Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

Employment Forecast Comparisons



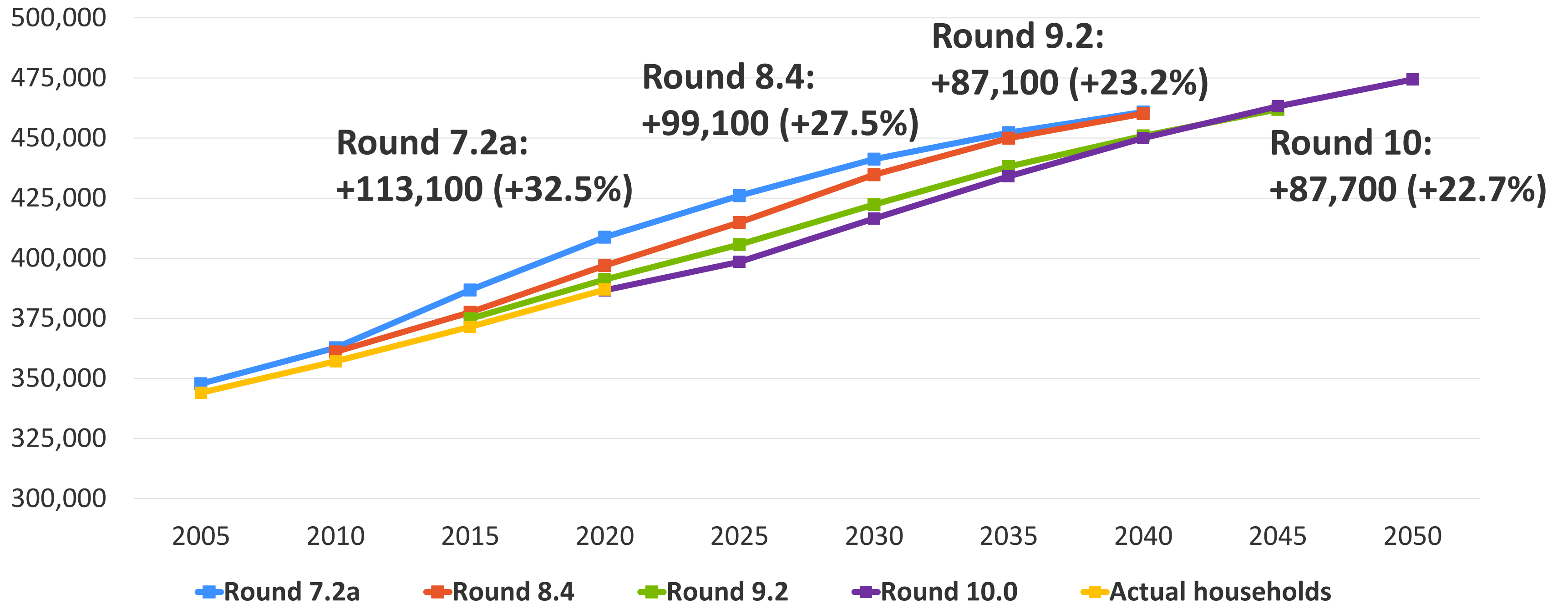
*Note: Numbers for absolute change rounded to the nearest hundred. Numbers for absolute change and percent change calculated from unrounded numbers.
 Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.*

Population Forecast Comparisons



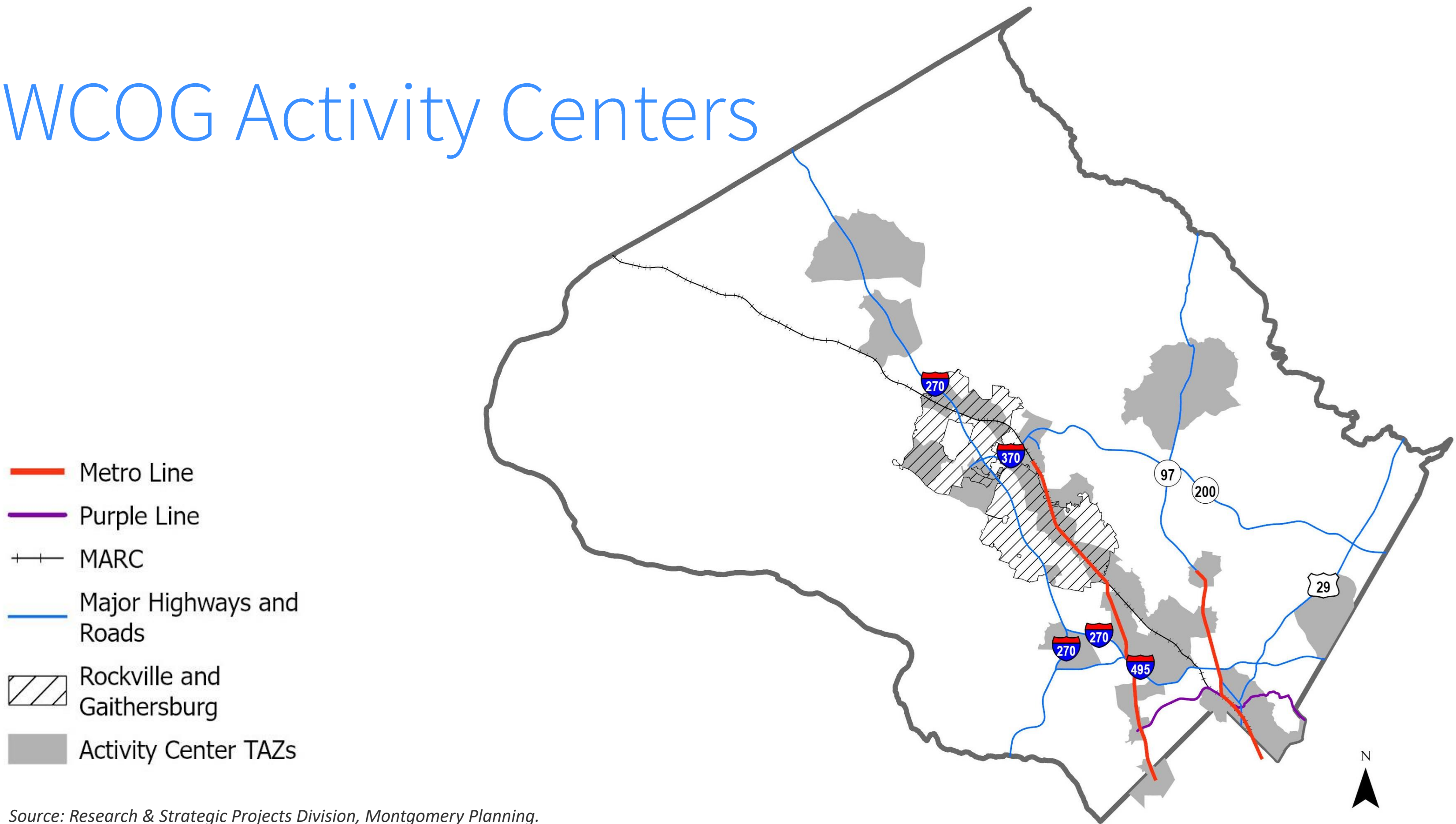
Note: Numbers for absolute change rounded to the nearest hundred. Numbers for absolute change and percent change calculated from unrounded numbers.
 Source: MNCPPC, Montgomery Planning, Research and Strategic Projects.

Household Forecast Comparisons



Note: Numbers for absolute change rounded to the nearest hundred. Numbers for absolute change and percent change calculated from unrounded numbers.
 Source: MNCPPC, Montgomery Planning, Research and Strategic Projects

MWCOG Activity Centers



Source: Research & Strategic Projects Division, Montgomery Planning.

Forecasted Growth in MWCOG Activity Centers

- Activity centers are expected to have an increasing share of population, households, and jobs

Forecasted Increases in Population, Households, and Jobs Relative to MWCOG Activity Centers, 2020-2050

Location	2020 Population	2050 Population	Population Increase	2020 Households	2050 Households	Household Increase	2020 Jobs	2050 Jobs	Jobs Increase
Activity Center	315,149	444,192	+129,043	129,789	192,127	+62,338	287,144	395,881	+108,737
Not Activity Center	746,094	806,466	+60,372	256,844	282,193	+25,349	206,407	240,590	+34,183

Source: Metropolitan Washington Council of Governments, Cooperative Forecast Round 10.0.

Forecasted Growth in MWCOG Activity Centers

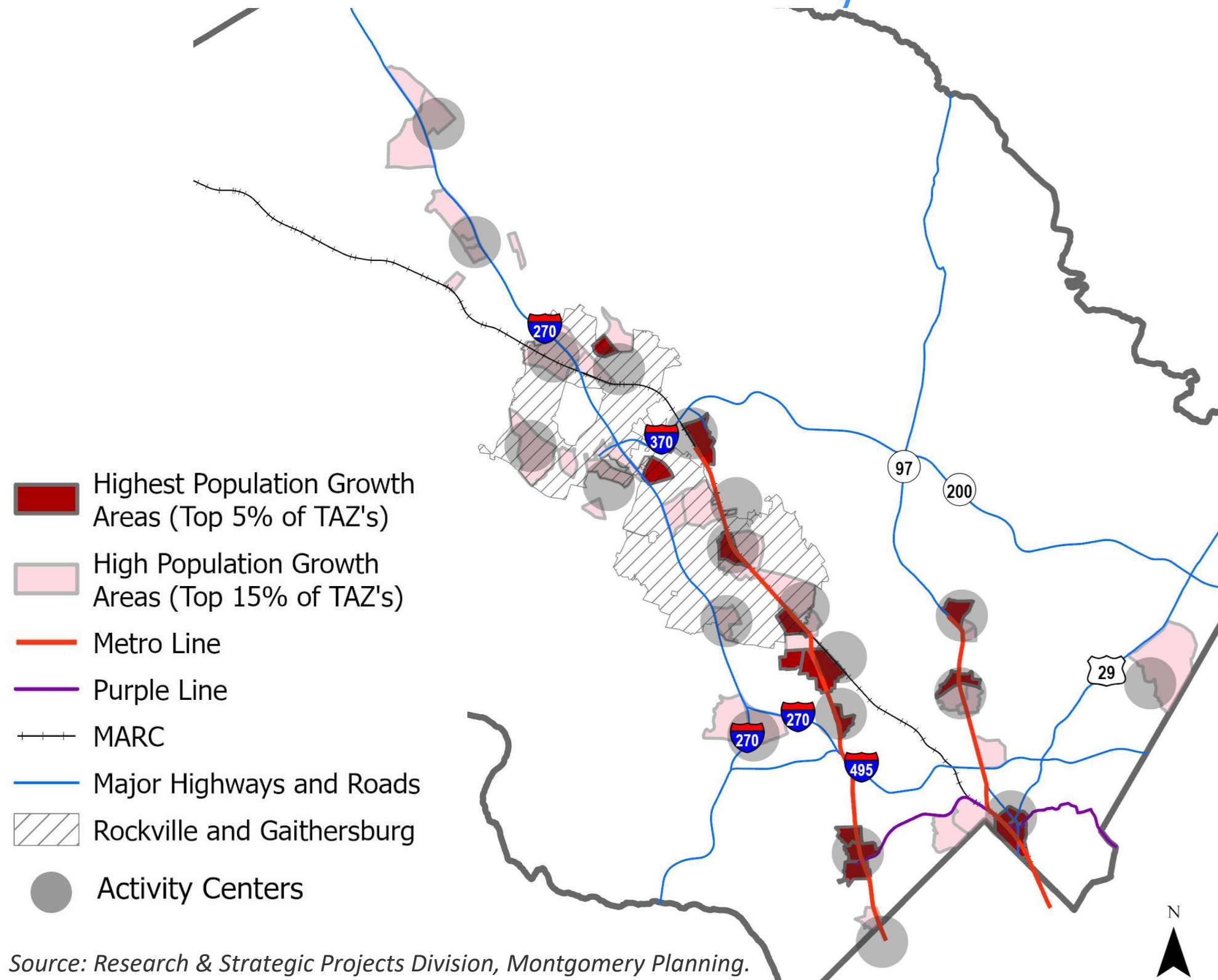
- Activity centers are expected to have an increasing share of population, households, and jobs

Forecasted Shares of Population, Households, and Jobs in MWCOG Activity Centers, 2020-2050

Location	2020 Population Share	2050 Population Share	Population Share Increase	2020 Household Share	2050 Household Share	Household Share Increase	2020 Jobs Share	2050 Jobs Share	Jobs Share Increase
Activity Center	29.7%	35.5%	+5.8%	33.6%	40.5%	+6.9%	58.2%	62.2%	+4.0%
Not Activity Center	70.3%	64.5%	-5.8%	66.4%	59.5%	-6.9%	41.8%	37.8%	-4.0%

Source: Metropolitan Washington Council of Governments, Cooperative Forecast Round 10.0.

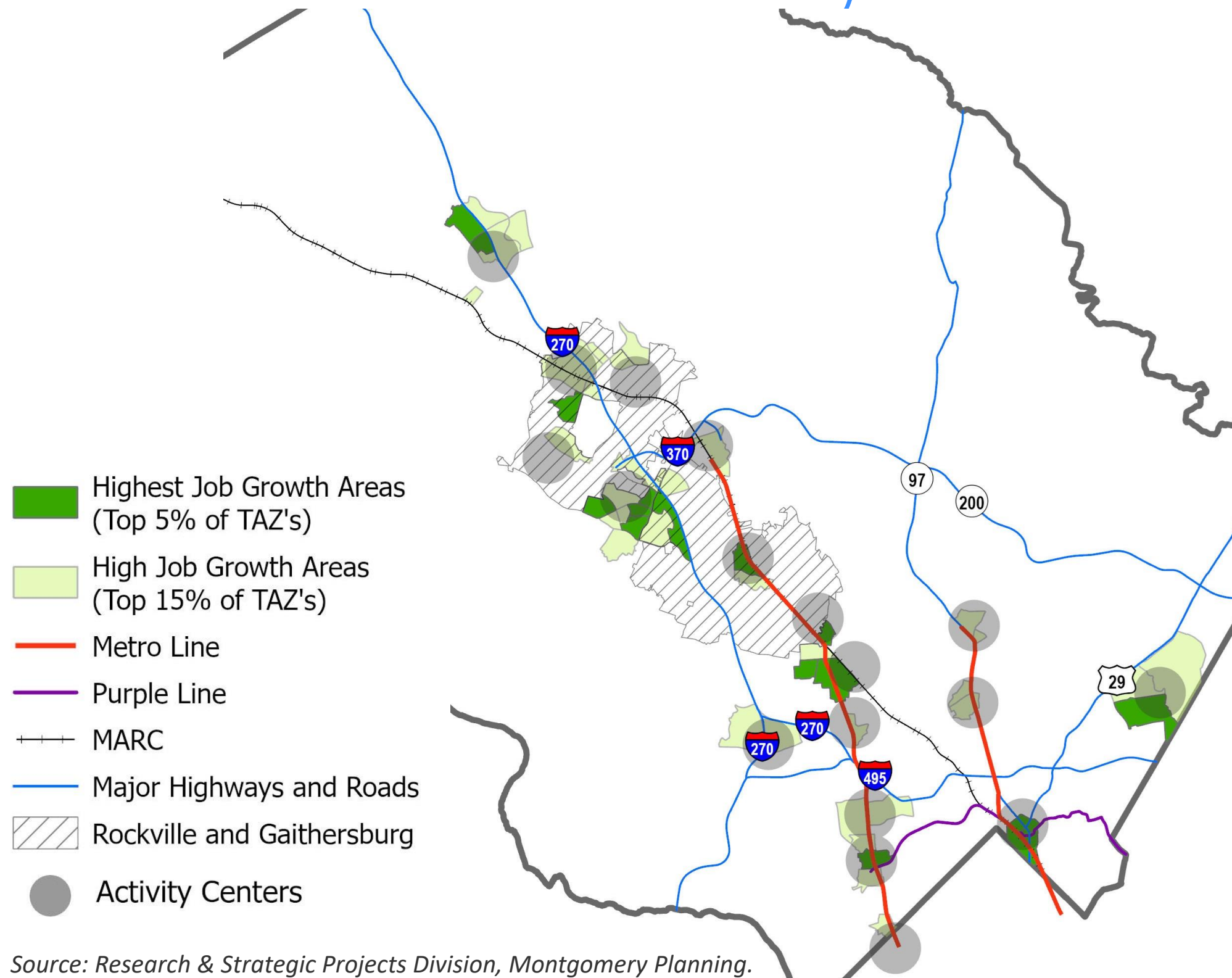
Forecasted Population Growth Hotspots in MWCOG Activity Centers



Activity Center	30-year change, persons per acre
Bethesda	34.74
White Flint	13.87
Wheaton	11.74
Friendship Heights	10.76
Silver Spring	7.59
Rockville Town Center	6.60
Rockville Tower Oaks	6.54
Glenmont	5.61
Grosvenor	5.57
Rockville Twinbrook	5.42
Gaithersburg Central	5.08
Rockville King Farm-Research Center-Shady Grove	4.95
Rock Spring	4.93
Gaithersburg Metropolitan Grove	3.86
Life Sciences Center-Gaithersburg Crown	3.65
Germantown	2.34
Gaithersburg Kentlands	2.12
White Oak-FDA	2.12
Clarksburg	1.56
Rockville Montgomery College	1.25
Takoma Park	0.78
Kensington	0.72
Olney	0.15
NIH-Walter Reed National Military Medical Center	0.01

Source: Research & Strategic Projects Division, Montgomery Planning.

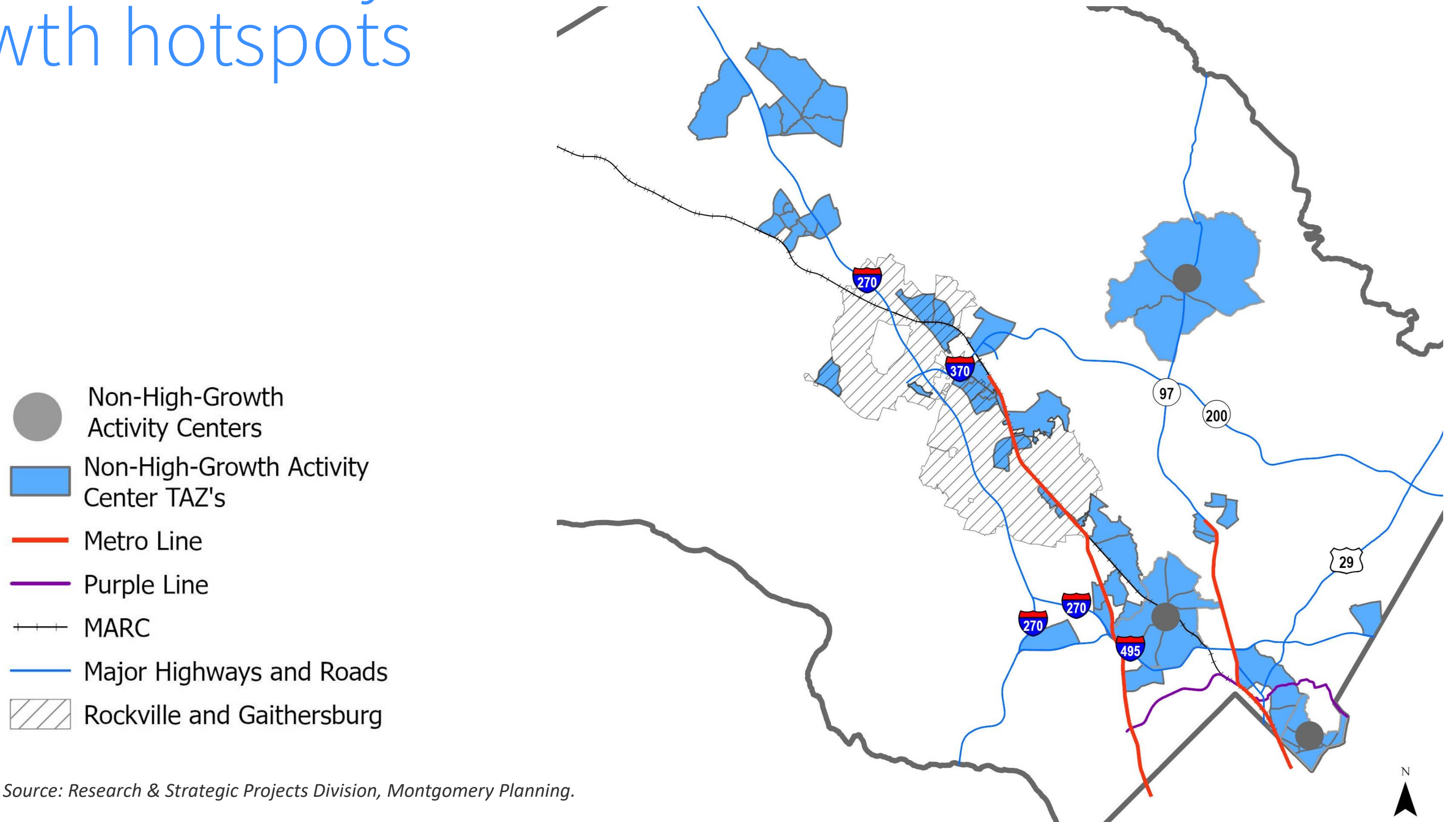
Forecasted Job Growth Hotspots in MWCOCG Activity Centers



Source: Research & Strategic Projects Division, Montgomery Planning.

Activity Center	30-year change, jobs per acre
Bethesda	20.68
White Flint	11.79
Friendship Heights	9.19
Gaithersburg Metropolitan Grove	8.46
Life Sciences Center-Gaithersburg Crown	8.20
White Oak-FDA	7.64
Rockville Town Center	6.60
NIH-Walter Reed National Military Medical Center	5.80
Germantown	4.48
Wheaton	3.96
Silver Spring	3.56
Rock Spring	3.25
Gaithersburg Kentlands	2.60
Rockville Twinbrook	2.15
Rockville Tower Oaks	2.15
Gaithersburg Central	1.76
Rockville King Farm-Research Center-Shady Grove	1.15
Glenmont	0.95
Rockville Montgomery College	0.84
Grosvenor	0.82
Clarksburg	0.41
Takoma Park	0.40
Kensington	0.21
Olney	0.20

MWCOG Activity Centers not forecasted to be growth hotspots



Source: Research & Strategic Projects Division, Montgomery Planning.

Summary

Summary of Growth Trends

- COVID-19 pandemic – may be a temporary disruption of longer historical trends
- More racially diverse and aging population
- Increasing share of housing stock are units in large multifamily buildings
- Population and employment projected to grow at a slower pace
- Further projected growth in jobs and population near major transportation corridors

Q&A